Word 2010 Advanced: Part II

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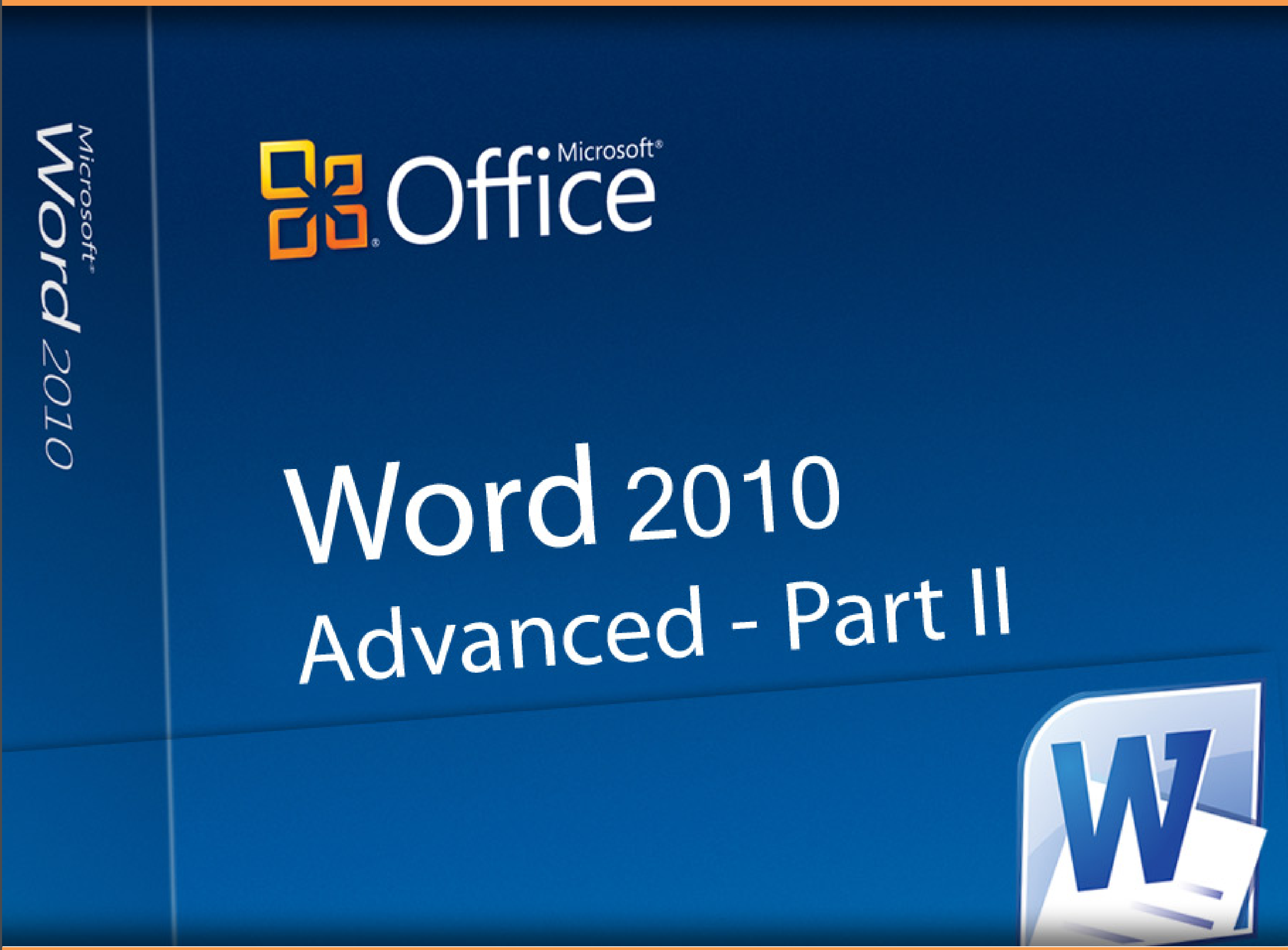
Stephen Moffat, The Mouse Training Company



Stephen Moffat, The Mouse Training Company

Word 2010 Advanced

Part II

Word 2010 Advanced: Part II

ISBN 978-87-7681-849-4

Contents

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Word 2010 Advanced: Part I

Section 5 Mailmerge

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By the end of this section you will be able to:

- Use mail merge to create and print letters and other documents
- Understand what templates can be used for
- Setup a merge document
- Connect to a data source
- Merge data to main document

Mailmerge create letters and other documents

You use mail merge when you want to create a set of documents, such as a form letter that is sent to many customers or a sheet of address labels. Each letter or label has the same kind of information, yet the content is unique. E.G. in letters to your customers, each letter can be personalized to address each customer by name. The unique information in each letter or label comes from entries in a data source.

Main Steps

The mail merge process entails the following overall steps:

- ***SET UP THE MAIN DOCUMENT.*** *The main document contains the text and graphics that are the same for each version of the merged document. E.G., the return address or salutation in a form letter.*
- ***CONNECT THE DOCUMENT TO A DATA SOURCE***. *A data source is a file that contains the information to be merged into a document. E.G., the names and addresses of the recipients of a letter.*
- ***ADD PLACEHOLDERS***, *CALLED MAIL MERGE FIELDS, TO THE DOCUMENt. When you perform the mail merge, the mail merge fields are filled with information from your data file.*
- ***REFINE THE LIST OF RECIPIENTS OR ITEMS.*** *Word generates a copy of the main document for each item, or record, in your data file. If your data file is a mailing list, these items are probably recipients of your mailing. If you want to generate copies for only certain items in your data file, you can choose which items (records) to include.*
- ***PREVIEW AND COMPLETE THE MERGE***. *You can preview each copy of the document before you print the whole set.*

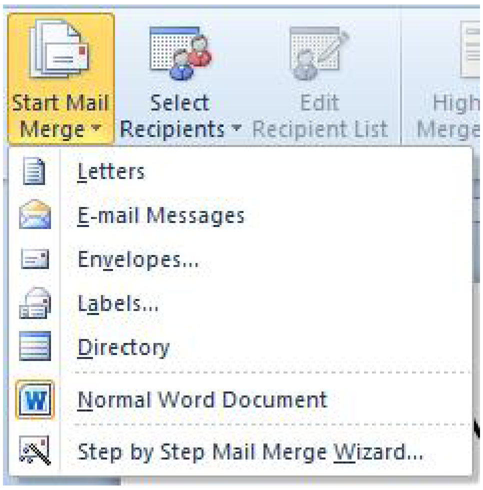
You use commands on the MAILINGS ribbon to perform a mail merge.

You can also perform a mail merge by using the MAIL MERGE task pane, which leads you step by step through the process. To use the task pane, in the START MAIL MERGE group on the MAILINGS ribbon, click START MAIL MERGE, and then click STEP BY STEP MAIL MERGE WIZARD.

Set Up The Main Document

› <u>To set up main document.</u>

<u>Mouse</u>



1. Open or create a document and leave it open. If you close it, the commands in the next step are not available.
2. On the **MAILINGS** ribbon, in the **START MAIL MERGE** group, click **START MAIL MERGE**.
3. Click the type of document that you want to create.

- ***A SET OF ENVELOPES*** *The return address is the same on all the envelopes, but the destination address is unique on each one. Click* ***ENVELOPES****, and then specify your preferences for envelope size and text formatting on the* ***ENVELOPE OPTIONS*** *tab of the* ***ENVELOPE OPTIONS*** *dialog box.*
- ***A SET OF ADDRESS LABELS*** *Each label shows a person's name and address, but the name and address on each label is unique. Click* ***LABELS****, and then specify your preferences for the type of label in the* ***LABEL OPTIONS*** *dialog box.*
- ***A SET OF FORM LETTERS OR E-MAIL MESSAGES*** *The basic content is the same in all the letters or messages, but each contains information that is specific to the individual recipient, such as name, address, or some other piece of information. Click* ***LETTERS*** *or* ***E-MAIL MESSAGES*** *to create these types of documents.*
- ***A CATALOG OR DIRECTORY*** *The same kind of information, such as name and description, is shown for each item, but the name and description in each item is unique. Click* ***DIRECTORY*** *to create this type of document.*

To resume a mail merge

If you need to stop working on a mail merge, you can save the main document and resume the merge later. Microsoft Office Word retains the data source and field information. If you were using the **MAIL MERGE** task pane, Word returns to your place in the task pane when you resume the merge.

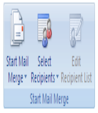
Mouse

1. When you're ready to resume the merge, open the document. Word displays a message that asks you to confirm whether you want to open the document, which will run a SQL command to reconnect you to your data source.

2. Because this document is connected to a data source and you want to retrieve the data, click **YES**. If you were opening a document that you did not realize was connected to a data source, you could click **NO** to prevent potentially malicious access to data.
3. The text of the document, along with any fields that you inserted, appears.
4. Click the **MAILINGS** ribbon, and resume your work.

Connect The Document To A Data Source

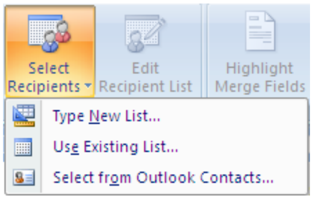
To merge information into your main document, you must connect the document to a data source, or a data file. If you don't already have a data file, you can create one during the mail merge process.

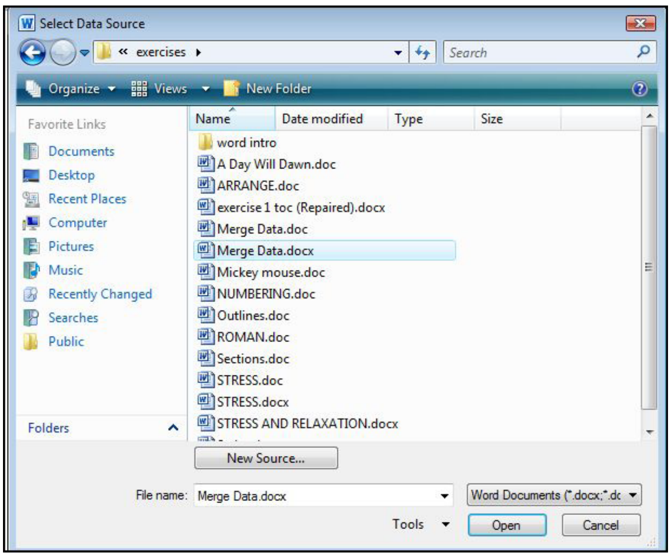


To choose a data file from outlook

Mouse

1. On the **MAILINGS** ribbon, in the **START MAIL MERGE** group, click **SELECT RECIPIENTS**.





2. Choose **EXISTING LIST** The **SELECT DATA SOURCE** dialog opens.
3. Locate the file with your data and click on **OPEN**.

- *We will use a word document but you may use any of the following data sources.*
- *Our word data is laid out in a table as in the following picture (there is no need to open the document just connect to it).*

Title	FirstName	LastName	Company	Address1	City	State	Zip
Mr.	Tim	Granus	Virginia Conservation	354 Saw Mill Road	Alexandria	VA	22311
Mr.	Carlos	Santos	Santos Inc.	145 Windsor Dr.	Alexandria	VA	22314
Ms.	Rachel	Tagon	EGS	112 Perry Street	Aurora	CO	80015
Mr.	William	Moore	Diversified Corporation	561 Third Street	Austin	TX	78728
Mrs.	Anne	Smolkovich	Shelburne Schools	693 Northcutt Drive	Burlington	VT	05401
Mr.	Ben	Willenbecher	McCooey & Sons	87 Country Lane	Charlottesville	VA	22054
Ms.	Samantha	MacFall	W. Mercer and	9 Robinwood Trail	Chicago	IL	60616

You May use data from any of these sources

- ***EXCEL FILE*** *If you have a Microsoft Office Excel worksheet, a Microsoft Office Access database, or another type of data file, click* ***USE EXISTING LIST****, and then locate the file in the* ***SELECT DATA SOURCE*** *dialog box you can select data from any worksheet or named range within a workbook. For Access, you can select data from any table or query that is defined in the database. For another type of data file, select the file in the* ***SELECT DATA SOURCE*** *dialog box. If the file is not listed, select the appropriate file type or select* ***ALL FILES*** *in the* ***FILES OF TYPE*** *box. In a mail merge, you can use the following types of data files:*
- ***DATABASE****.- Files from single-tier, file-based database programs for which you have installed an OLE DB provider or ODBC (Open Database Connectivity): A standard method of sharing data between databases and programs. ODBC drivers use the standard Structured Query Language (SQL) to gain access to external data.) driver (a number of which are included with Microsoft Office).*
- ***CSV (DELIMITED TEXT FILE)****Click the* ***USE AN EXISTING LIST*** *option, and browse to locate the .csv file that you have exported or any text file that has data separated (or delimited) by tab characters or commas and data records separated by paragraph marks.. Before the file opens, you may be asked to select which separator character will separate one column from another in your address list. Click* ***COMMA*** *for CSV files, and then click* ***OK****.*
- ***CONTACTS (OUTLOOK)****If you want to use your Contacts list in Outlook, click Select from Outlook Contacts. Any similar address lists that were created with a MAPI -compatible messaging system.*
- ***A MICROSOFT WORD DOCUMENT****. The document should contain a single table. The first row of the table must contain headings, and the other rows must contain the records that you want to merge. You can also use a header source (header source: A document that contains the header row (or header record) to be used with the data source specified for a mail-merge main document.) as a data source.*
- ***HTML*** *file. An HTML file that has a single table. The first row of the table must contain column names, and the other rows must contain data.*

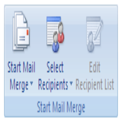
MICROSOFT SCHEDULE+ 7.0 Contact List

To Sort Or Filter The List Of Recipients

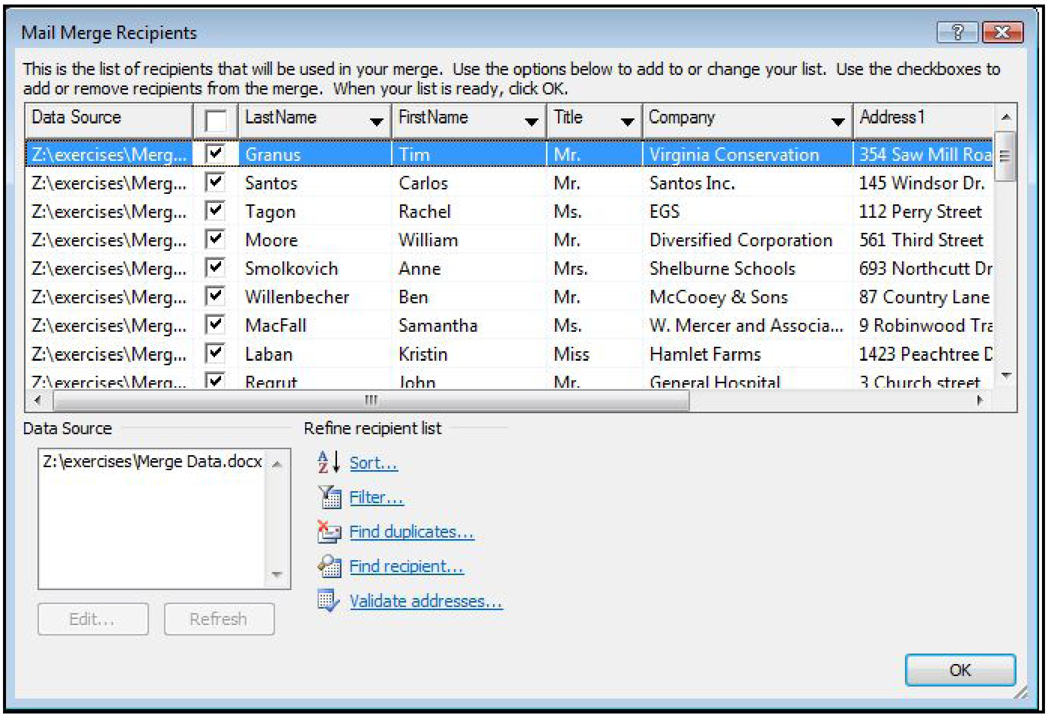
When you connect to a certain data file, you might not want to merge information from all the records in that data file into your main document.

To refine list of recipients

Mouse



1. On the **MAILINGS** Ribbon, in the **START MAIL MERGE** group, click **EDIT RECIPIENT** List.
2. In the **MAIL MERGE RECIPIENTS** dialog box Select individual records to filter your list. This method is most useful if your list is short. Select the check boxes next to the recipients you want to include, and clear the check boxes next to the recipients you want to exclude.
   If you know that you want to include only a few records in your merge, you can clear the check box in the header row and then select only those records that you want. Similarly, if you want to include most of the list, select the check box in the header row, and then clear the check boxes for the records that you don't want to include.



To Sort records

Mouse

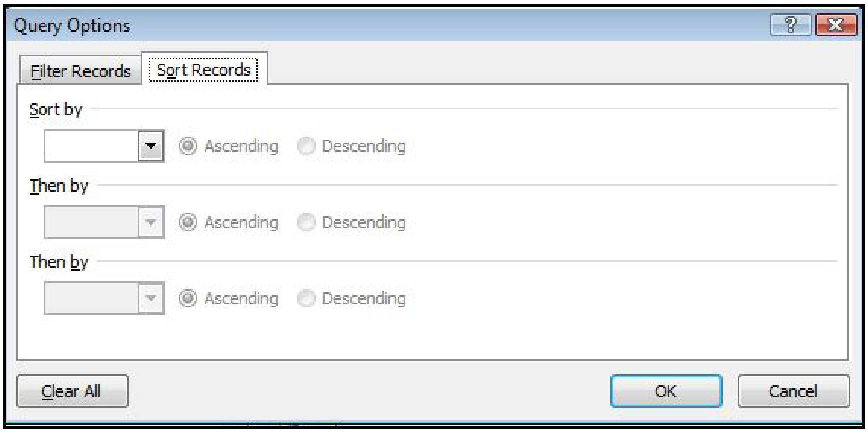
1. Click the column heading of the item that you want to sort by. The list sorts in ascending alphabetical order (from A to Z). Click the column heading again to sort the list in descending alphabetical order (Z to A).
   If you want more complex sorting, click SORT under REFINE RECIPIENT LIST and choose your sorting preferences on the SORT RECORDS tab of the FILTER AND SORT dialog box.

- *E.G. you can use this type of sorting if you want recipient addresses to be alphabetized by last name within each post code and the post codes listed in numerical order.*
  If you have installed address validation software, you can click Validate addresses in the Mail Merge Recipients dialog box to validate your recipients' addresses.

To sort records by dialog

Mouse

1. Under **REFINE RECIPIENT LIST**, click **SORT**.
2. On the **SORT RECORDS** tab of the **FILTER AND SORT** dialog box, choose the fields you want to sort by you can sort by up to three levels.



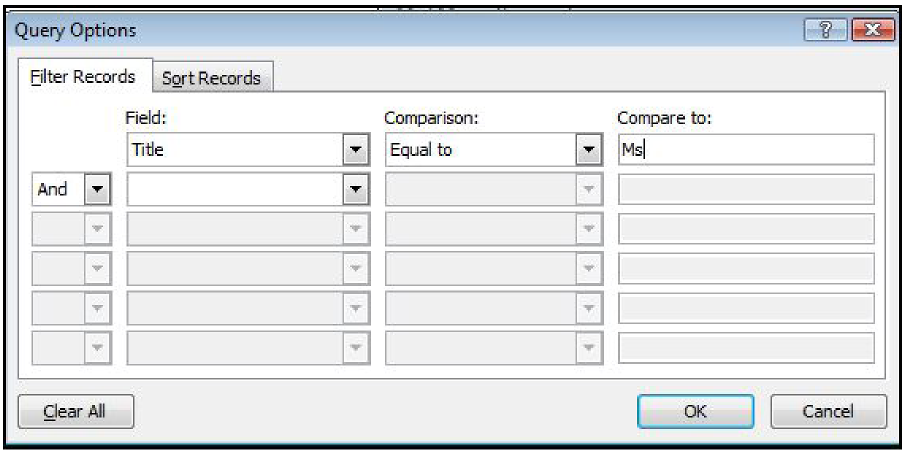
3. Click **OK** to apply the sort

› To Filter records by dialog

This is useful if the list contains records that you know you don't want to see or include in the merge. After you filter the list, you can use the check boxes to include and exclude records.

Mouse

4. Under **REFINE RECIPIENT LIST**, click **FILTER**.
5. On the **FILTER RECORDS** tab of the **FILTER AND SORT** dialog box, choose the criteria you want to use for the filter.



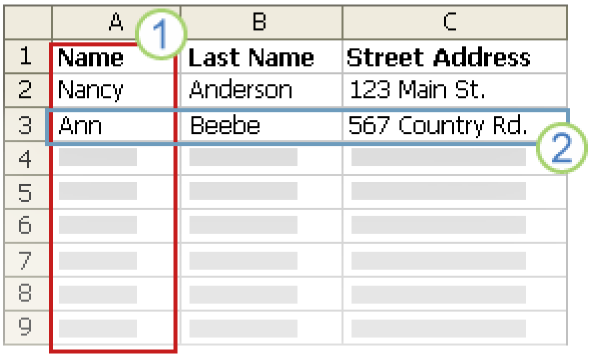
- *E.G. to generate copies of your main document only for the people titled "Ms" that list shows as the Title, you would click title in the Field list, Equal to in the Comparison list, and shows "Ms" in the Compare to list.*

6. To refine the filter further, click **AND** or **OR**, and then specify more criteria.

Merge Fields

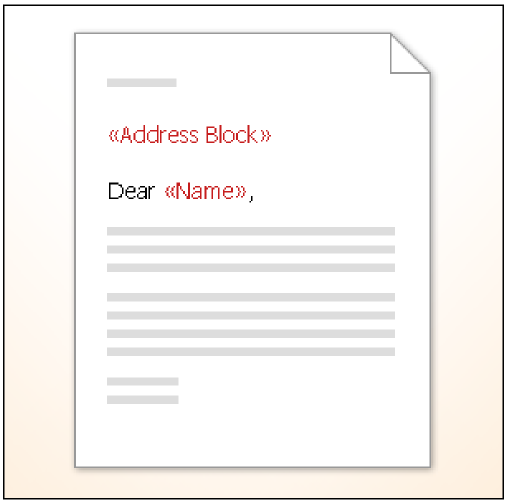
After you connect your main document to a data file and have refined your list of recipients you are ready to type the text of the document and add placeholders that indicate where the unique information will appear in each copy of the document.

The placeholders, such as address and greeting, are called mail merge fields. Fields in Word correspond to the column headings in the data file that you select.



1 **COLUMNS** in a data file represent categories of information. Fields that you add to the main document are placeholders for these categories.

2 **ROWS** in a data file represent records of information. Word generates a copy of the main document for each record when you perform a mail merge.



By putting a field in your main document, you indicate that you want a certain category of information, such as name or address, to appear in that location.

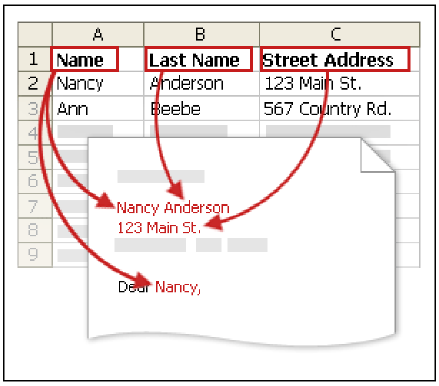
> ***When you insert a mail merge field into the main document, the field name is always surrounded by chevrons (« »). These chevrons do not show up in the merged documents. They just help you distinguish the fields in the main document from the regular text.***

What happens when you merge

When you merge, information from the first row in the data file replaces the fields in your main document to create the first merged document. Information from the second row in the data file replaces the fields to create the second merged document, and so on.

Examples

You can add any column heading from your data file to the main document as a field. This gives you flexibility when you design form letters, labels, e-mail messages, and other merged documents. E.G.:



Suppose you are creating a letter to notify local businesses that they have been selected for inclusion in your annual city guide. If your data file contains a Company column with the name of each business that you want to contact, you can insert the «Company» field instead of typing the name of each individual company.

Imagine that you send quarterly e-mail messages to your customers alerting them to new products and special deals. To personalize those messages for your best customers, you can add a "PersonalNote" column to your data file where you can type notes such as "Miss Miller, the new widget is exactly what you have been looking for." By placing a «PersonalNote» field in the main document, you can include those notes at the bottom of certain messages.

Suppose that your mailing list is for subscribers to your newsletter, and your data file includes a column, called ExpireDate, for storing the date that each subscription expires. If you place an «ExpireDate» field in the label main document before you run the merge, subscribers will each see their own expiration date on their mailing label.

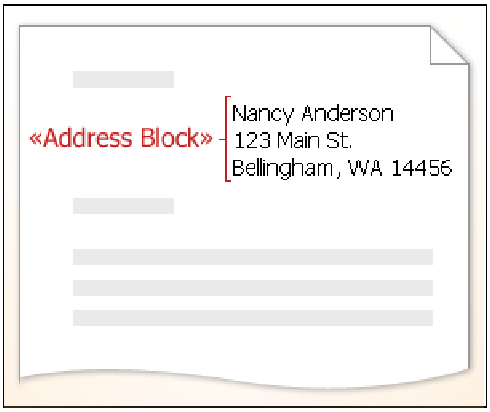
You can combine fields and separate them by punctuation marks. E.G. to create an address, you can set up the fields in your main document like this:

«First Name» «Last Name»

«Street Address»

«City», «State» «Postal code»

Address Blocks



For things that you use frequently, like address blocks and greeting lines, Word provides composite fields that group a number of fields together. E.G.:

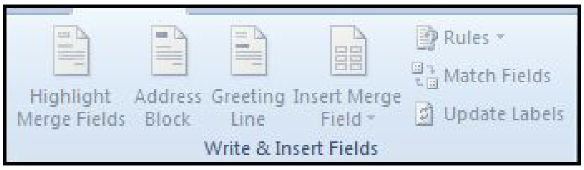
The Address Block field is a combination of several fields, including first name, last name, street address, city, and postal code.

The Greeting Line field can include one or more name fields, depending on your chosen salutation.

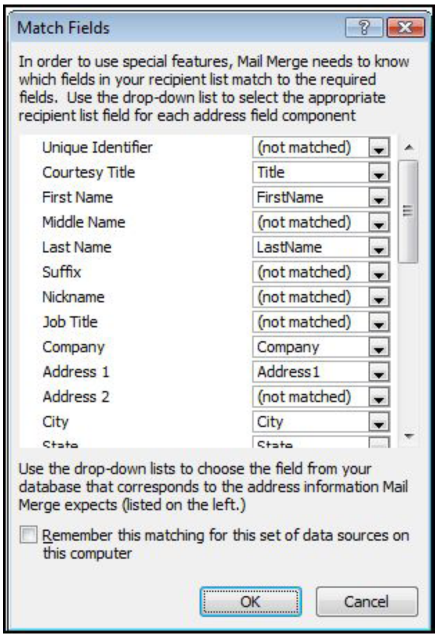
You can customize the content in each of these composite fields. E.G. in the address, you may want to select a formal name format (Mr. Joshua Randall Jr.); in the greeting, you may want to use "To" instead of "Dear."

To create address blocks

To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to map the mail merge fields in Word to the columns in your data file.



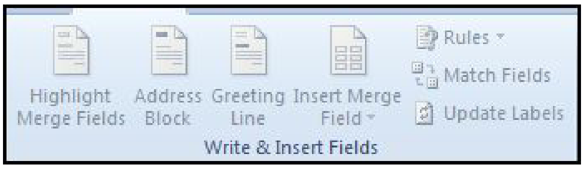
Mouse



1. To map the fields, click **MATCH FIELDS** in the **WRITE & INSERT FIELDS** group of the **MAILINGS** ribbon. The Match Fields dialog box opens.
2. The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.
3. Word searches for the column that matches each element. In the illustration, Word automatically matched the data file's **SURNAME** column to **LAST NAME**. But Word was unable to match other elements. From this data file, E.G. Word can't match **FIRST NAME**.
4. In the list on the right, you can select the column from your data file that matches the element on the left. In the illustration, the **NAME** column now matches **FIRST NAME**. It's okay that **COURTESY TITLE, UNIQUE IDENTIFIER**, and **MIDDLE NAME** aren't matched. Your mail merge document doesn't need to use every field. If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field.

Type Content And Add Fields

To insert fields

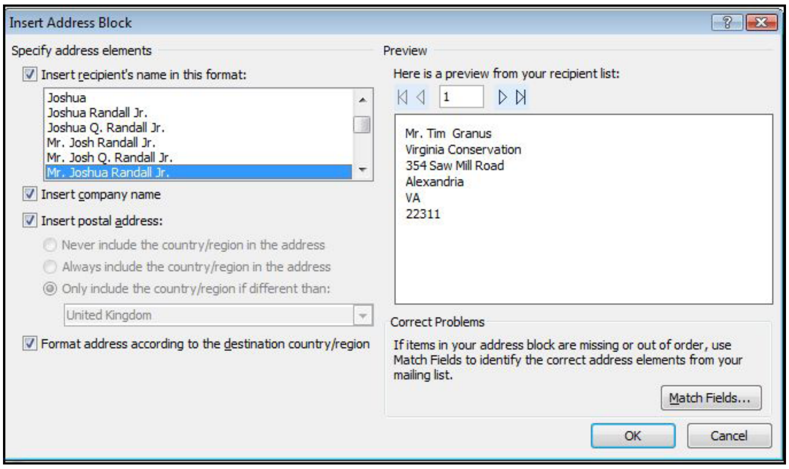


1. In the main document, click where you want to insert the field.
2. Use the **WRITE & INSERT FIELDS** group on the **MAILINGS** ribbon.

To add Address block with name, address, and other information

Mouse

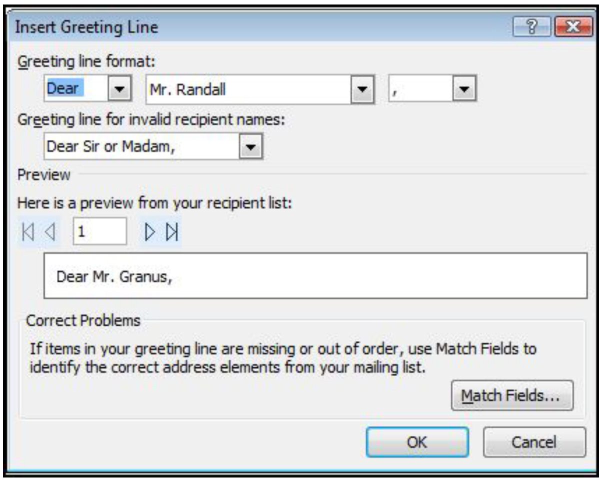
1. Click **ADDRESS BLOCK.**



2. In the **INSERT ADDRESS BLOCK** dialog box, select the address elements that you want to include and the formats that you want, and then click **OK**.
3. If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See previous how to match fields.)

To insert Greeting line

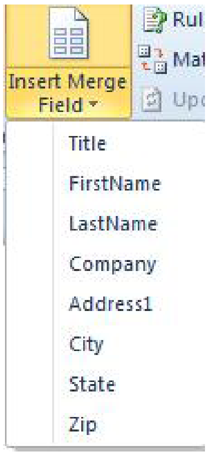
Mouse



1. Click **GREETING LINE**.
2. Select the greeting line format, which includes the salutation, name format, and following punctuation.
3. Select the text that you want to appear in cases where Word can't interpret the recipient's name, E.G. when the data source contains no first or last name for a recipient, but only a company name.
4. Click **OK**.
5. If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See above how to match fields.)

To insert Individual fields

You can insert information from individual fields, such as first name, telephone number, or the amount of a contribution from a list of donors. To quickly add a field from your data file to the main document, click the arrow next to **INSERT MERGE FIELD,** and then click the field name.

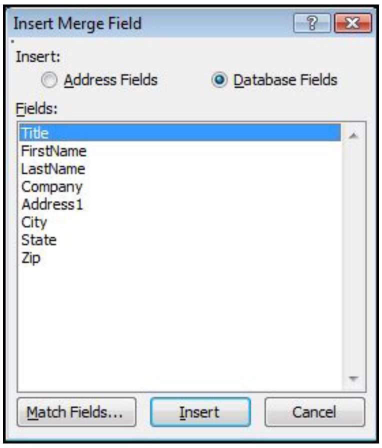


Mouse

1. On the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the arrowed part of the **INSERT MERGE FIELD** button.
2. Select a field from the drop down list for it to be inserted.

Or

1. On the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the **INSERT MERGE FIELD** button. To open the insert merge field dialog
2. In the **INSERT MERGE FIELD** dialog box, (To select address fields that will automatically correspond to fields in your data source, even if the data source's fields don't have the same name as your fields), click **ADDRESS FIELDS**.



3. To select fields that always take data directly from a column in your data file, click **DATABASE FIELDS.**
4. In the **FIELDS** box, click the field you want.
5. Click **INSERT**, and then click **CLOSE**.
6. If the **MATCH FIELDS** dialog box appears, Word may have been unable to find some of the information that it needs for the address block. (See previous how to match fields.)

If you insert a field from the DATABASE FIELDS list and then later switch to a data source that doesn't have a column with the same name, Word won't be able to insert that field information into the merged document.

Format Merged Data

Database and spreadsheet programs, such as Microsoft Office Access and Microsoft Office Excel, store the information that you type in cells as raw data. Formatting that you apply in Access or Excel, such as fonts and colours, isn't stored with the raw data. When you merge information from a data file into a Word document, you are merging the raw data without the applied formatting.

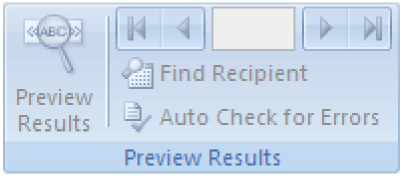
To format the data in the document, select the mail merge field and format it, just as you would format any text. Make sure that the selection includes the chevrons (« ») that surround the field.

Preview The Merge

After you add fields to your main document, you are ready to preview the merge results. When you are satisfied with the preview, you can complete the merge.

▸ To Preview the merge

You can preview your merged documents and make changes before you actually complete the merge.



To preview, do any of the following in the **PREVIEW RESULTS** group of the **MAILINGS** ribbon:

- *Click **PREVIEW RESULTS**.*
- *Page through each merged document by using the **NEXT RECORD** and **PREVIOUS RECORD** buttons in the **PREVIEW RESULTS** group.*
- *Preview a specific document by clicking **FIND RECIPIENT**.*
  Click Edit Recipient List in the Start Mail Merge group on the Mailings ribbon to open the Mail Merge Recipients dialog box, where you can filter the list or clear recipients if you see records that you don't want to include.

Completing The Merge

You can print the merged documents or modify them individually. You can print or change all or just a subset of the documents.

To Print the merged documents

Mouse

1. On the **MAILINGS** ribbon, in the **FINISH** group, click **FINISH & MERGE**, and then click **PRINT DOCUMENTS**.
2. Choose whether to print the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number.

To Change individual copies of the document

Mouse

1. On the **MAILINGS** ribbon, in the **FINISH** group, click **FINISH & MERGE,** and then click **EDIT INDIVIDUAL DOCUMENTS**.
2. Choose whether you want to edit the whole set of documents, only the copy that's currently visible, or a subset of the set, which you specify by record number. Word saves the copies that you want to edit to a single file, with a page break between each copy of the document.

Save the main document

Remember that merged documents that you save are separate from the main document. It's a good idea to save the main document itself if you plan to use it for another mail merge.

When you save the main document, you also save its connection to the data file. The next time that you open the main document, you are prompted to choose whether you want the information from the data file to be merged again into the main document.

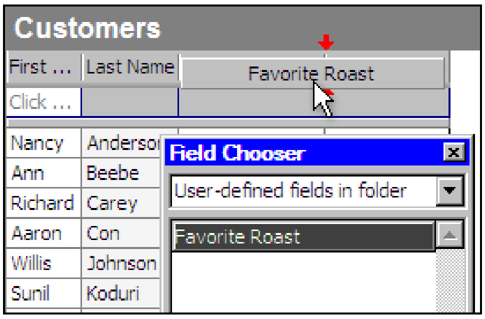
- *If you click **YES**, the document opens with information from the first record merged in.*
- *If you click **NO**, the connection between the main document and the data file is broken. The main document becomes a standard Word document. Fields are replaced with the unique information from the first record.*

Custom Fields From Outlook Contacts

The only way to include custom contact fields in your main document is to start the mail merge from within Outlook. First, set up a view of your contacts with the fields that you want to use in the merge. Then, start the mail merge. After you choose the settings that you want, Word will automatically open, and you can complete the merge.

To Set up a view of your contacts that includes custom fields

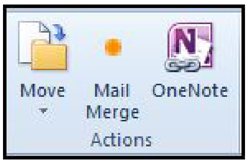
Mouse



1. In **OUTLOOK CONTACTS**, on the **VIEW** menu, point to **CURRENT VIEW**, and then click **PHONE LIST**.
2. Right-click a column heading, and then click **FIELD CHOOSER**.
3. In the drop-down list at the top of the **FIELD CHOOSER** dialog box, select **USER-DEFINED FIELDS IN FOLDER.**
4. Drag the field that you to add from the dialog box to the column headings. A little red arrow helps you place the field in the location that you want.
5. You can add a new field in the **FIELD CHOOSER** dialog box by clicking **NEW** at the bottom.
6. After you add all of your custom fields to the view, close the **FIELD CHOOSER** dialog box.
7. To remove a field that you do not want included in the mail merge, click the field name in the column heading in Phone List view, and drag it off of the column heading.

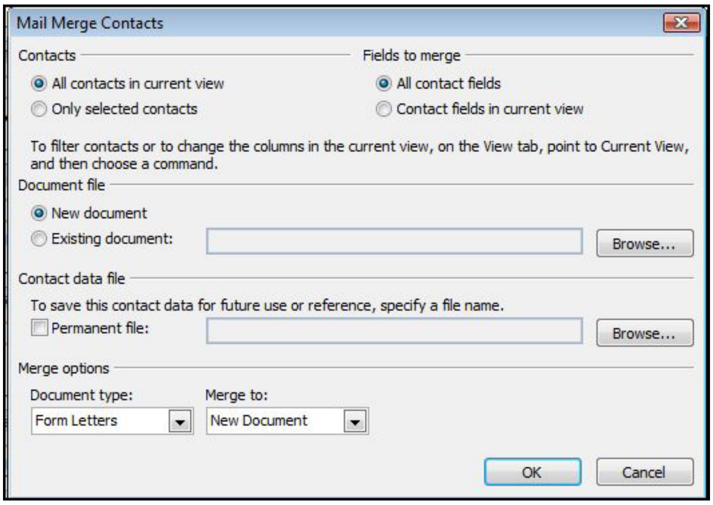
Run Mail Merge From Outlook

In Outlook Contacts, select individual contacts by pressing **SHIFT** and clicking to select a range or by pressing **CTRL** and clicking to select individuals. If you want to include all the contacts currently visible in the view, do not click on any contacts.



To MailMerge from outlook

Mouse



1. While in Outlook go to the **CONTACTS** folder
2. On the **HOME** ribbon in the **ACTIONS** group, click **MAIL MERGE**. The following dialog will open.

- *If you have selected individual contacts to include in the merge, click* ***ONLY SELECTED CONTACTS****.*
- *If you want to include all the contacts currently visible in the view, click* ***ALL CONTACTS IN CURRENT VIEW****.*

3. If you have configured the Phone List view so that it displays exactly the fields you want to use in the merge, click **CONTACT FIELDS IN CURRENT VIEW**. Otherwise, click **ALL CONTACT FIELDS** to make all of the contact fields available in the merge.
4. If you want to generate a new main document for the merge, click **NEW DOCUMENT**. Otherwise, click **EXISTING DOCUMENT**, and click **BROWSE** to locate the document to use as the main document.
5. If you want to save the contacts and fields that you have selected, so that they can be reused, select the **PERMANENT FILE** check box, and then click **BROWSE** to save the file. The data is saved in a Word document as comma-delimited data.
6. Select any merge options you want:

- ***FORM LETTERS*** *Prepare a batch of letters for a mass mailing.*
- ***MAILING LABELS*** *Set up address labels for a mass mailing.*
- ***ENVELOPES*** *Set up envelopes for a mass mailing.*
- ***CATALOGUE*** *Create a single document that contains a cattalo or address list.*
- ***NEW DOCUMENT*** *Generate merged documents, which you can edit individually in Word.*
- ***PRINTER*** *Send merged documents directly to the default printer.*
- ***E-MAIL*** *Generate merged documents designed to be e-mail messages. When you are ready to complete the merge in Word, on the* ***MAILINGS*** *ribbon in the* ***FINISH*** *group, click* ***FINISH & MERGE****, and then click* ***SEND E-MAIL MESSAGES****. The* ***SUBJECT*** *line is filled with the text you typed in the* ***MAIL MERGE CONTACTS*** *dialog box in Outlook.*

7. Click **OK**. When the document opens in Word, on the **MAILINGS** ribbon, in the **WRITE & INSERT FIELDS** group, click the arrow next to **INSERT MERGE FIELD,** and then click the fields that you want to add the document.

- *You can't type merge field characters («« »») manually or use the* ***SYMBOL*** *command on the* ***INSERT*** *ribbon. You must use mail merge.*

If the merge fields appear inside braces, such as ***{ MERGEFIELD City }****, then Microsoft Word is displaying field instead of field. This doesn't affect the merge, but if you want to display the results instead, right-click the field code, and then click* ***TOGGLE FIELD CODES*** *on the shortcut menu.*

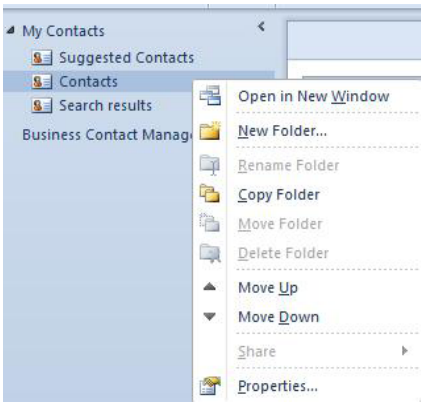
Troubleshooting

Tips For Working With Microsoft Outlook Contacts List

Connecting to your Outlook Contacts folder is usually a straightforward process, but sometimes you may encounter a problem. Here are solutions to common problems that you may encounter:

- *I can't find my Outlook Contacts folder to connect to it.*
- *I get error messages about mail clients and tables.*
- *I can't connect to an Outlook Contacts folder in Public Folders.*
- I want to use my Outlook Express address book as my Contacts folder, but I can't connect to it.**Turn on the Show this folder as an e-mail Address Book property**

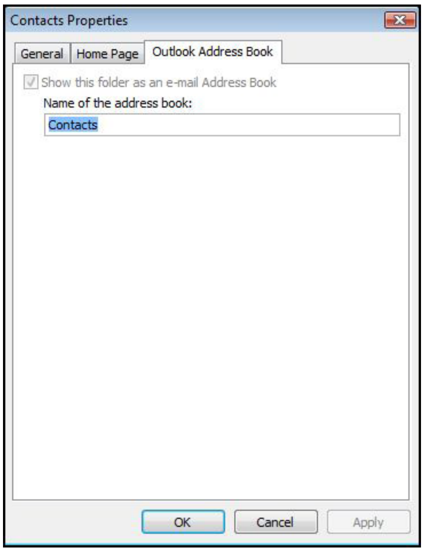
Mouse



1. In Microsoft Office Outlook, **GO** to **CONTACTS**.
2. Right-click the **CONTACTS** folder that contains the information that you want to use for a mail merge, and then click **PROPERTIES**

3) On the **OUTLOOK ADDRESS BOOK** tab, make sure that the **SHOW THIS FOLDER AS AN E-MAIL ADDRESS BOOK** check box is selected, and then click **OK**.

➤ To change your Outlook user profile



An Outlook user profile is a group of e-mail accounts and address books. Usually, you need only one profile but if you share your computer with other people or use different address books for different purposes, you can set up more than one profile. If, when you start your mail merge, you're using a profile that doesn't include the Contacts folder that you want to use, that folder won't be available.

To switch to a different user profile, restart Outlook. When you're prompted for a profile, choose the profile that includes the Contacts folder that you want to use in the mail merge.

If you aren't prompted for a profile and you know that you have more than one, you may want to set up Outlook so that it prompts you. To do this:

Mouse

1. Close Outlook.
2. In **CONTROL PANEL**, switch to **CLASSIC VIEW**, and then click **MAIL**.
3. Click **SHOW PROFILES.**
4. To be prompted to select a profile each time you start Outlook, click **PROMPT FOR A PROFILE TO BE USED**, and then click **OK**.

I get error messages about mail clients and tables

If you try to connect to your Contacts folder during a mail merge in Word, and Outlook is not set up as your default e-mail program in Windows Internet Explorer, you will get an error message that says:

- *"Either there is no default mail client or the current mail client cannot fulfil the messaging request. Please run Microsoft Office Outlook, and set it as the default mail client."*

To avoid getting this message during a mail merge.

Mouse

1. Exit Word.
2. On the Internet Explorer **TOOLS** menu, click **INTERNET OPTIONS**, and then click the **PROGRAMS** tab.
3. Under **E-MAIL,** click **MICROSOFT OFFICE OUTLOOK,** and then click **OK**.
4. Start Word again, open your mail merge document, and connect to your Outlook Contacts folder.

I can't connect to an Outlook Contacts folder in Public Folders

1. If you start a mail merge in Word and try to connect to an Outlook Contacts folder in **PUBLIC FOLDERS**, you get an error message that says:
- *"The operation cannot be completed because of dialog or database engine failures. Please try again later."*
2. If you try again later, you get the same error message.
3. To use a Public Folders Contacts folder as the data file for your mail merge, you have to start the mail merge from within Outlook.

To use my Outlook Express address book as my Contacts folder

You can't connect to this type of address book directly during a merge. Instead, export your Outlook Express address book as a .csv text file and then connect to it in that form.

To Export your Outlook Express address book:

Mouse

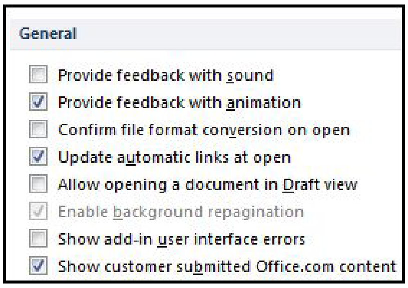
1. Start Microsoft Outlook Express.
2. On the **FILE** menu, point to **EXPORT**, and then click **ADDRESS BOOK.**
3. In the **ADDRESS BOOK EXPORT TOOL** dialog box, click **TEXT FILE (COMMA SEPARATED VALUES)**, and then click **EXPORT**.
4. In the **SAVE EXPORTED FILE AS** box, type a file name for your exported file, and then click **BROWSE**.
5. In the **SAVE AS** dialog box, in the **SAVE IN** list, choose where you want to save the file, and then click **SAVE**. It's handy to save data files in the **MY DATA SOURCES** folder in your **MY DOCUMENTS** folder. That's where Word looks first for data files when you browse for them during a merge.
6. Click **NEXT**. Select the check boxes next to the fields that you want to export, and then click **FINISH**.
- *When you are deciding which fields to export, think about the form letters or e-mail messages or labels that you intend to create with mail merge. E.G. if you never include nicknames or personal Web sites in your merged documents, don't export those fields.*
7. When you receive the message that the export procedure is completed, click **OK**.
8. To close the **ADDRESS BOOK EXPORT TOOL** dialog box, click **CLOSE**, and then exit Outlook Express.

Tips For Formatting Data In Excel

If your data file is an Excel worksheet that includes percentages, currency values, or postal codes, you can preserve the numeric formatting of the data by using Dynamic Data Exchange to connect to the Excel worksheet from Word. E.G. you can make sure a five-digit postal code of 07865 from your data file is not displayed as the number 7865 (without the leading zero).

› Before you connect to the worksheet, do the following in Word:

Mouse



1. Click the **FILE TAB** , and then click **OPTIONS**.
2. Click **ADVANCED**.
3. Scroll to the **GENERAL** section, and select the **CONFIRM FILE FORMAT CONVERSION ON OPEN** check box.
4. Click **OK**.
5. With the mail merge main document open, in the **START MAIL MERGE** group of the **MAILINGS** ribbon, click **SELECT RECIPIENTS**, and then click **USE EXISTING LIST**.
6. Locate the Excel worksheet in the **SELECT DATA SOURCE** dialog box, and double-click it.
7. In the **CONFIRM DATA SOURCE** dialog box, click **MS EXCEL WORKSHEETS VIA DDE** (*.xls), and then click **OK**.
8. If you don't see MS Excel Worksheets via DDE (*.xls), select the **SHOW ALL** check box.
9. In the **MICROSOFT OFFICE EXCEL** dialog box, for **NAMED OR CELL RANGE**, select the cell range or worksheet that contains the information that you want to merge, and then click **OK**.

- *To prevent being prompted every time you open a data file, you can turn off the* ***CONFIRM CONVERSION AT OPEN*** *option after you have connected to the worksheet.*
- *If you don't have a data file yet, click* ***TYPE A NEW LIST****, and then use the form that opens to create your list. The list is saved as a database (.mdb) file that you can reuse.*
  If you installed 2010 Microsoft Office system (instead of installing Microsoft Word by itself), you can also use Microsoft Query to construct a query and retrieve the data you want from an external data source.

Section 6 Indexes, Tables, Cross reference

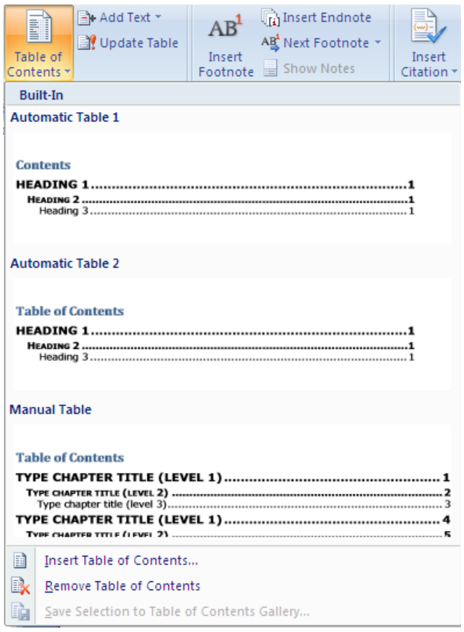
By the end of this section you will be able to:

- Create a table of contents
- Change what the table of contents displays
- Format TOC styles
- Use query options to select which data to merge
- Build and maintain a bibliography and insert citations.
- Create cross-references to page numbers
- Create cross-references to heading text
- Create cross-references using bookmarks
- Update cross-references
- Delete cross-references

Table of Contents

A table of contents lists headings and their corresponding page numbers. Word provides some preset table of contents layouts, which enable you to quickly insert a table in your document. The table can be based on standard Heading Level Styles, user-defined styles or a combination of both.

Inserting a Table of Contents



The table of contents will be inserted at the cursor position.

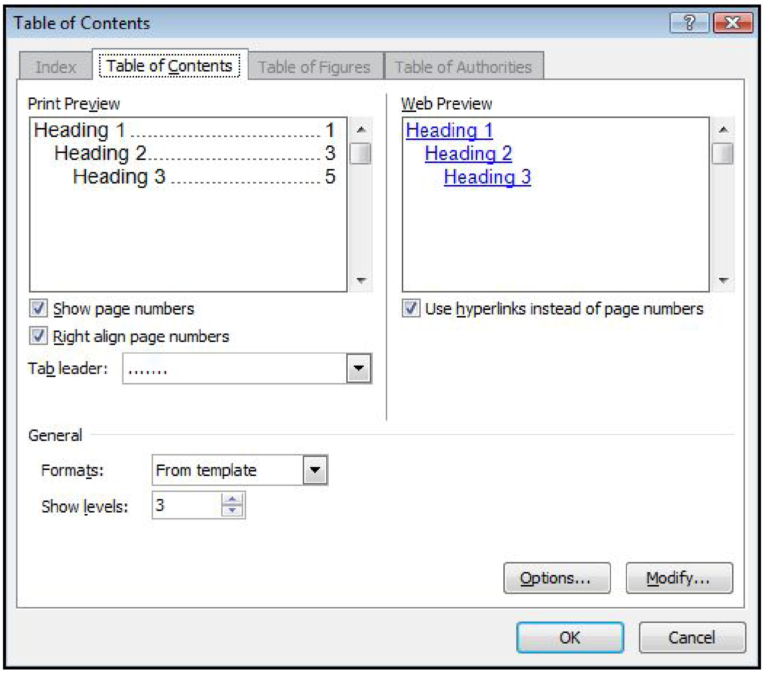
▸ <u>To insert a Table of Contents:</u>

<u>Mouse</u>

1. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **TABLE OF CONTENTS** button to display a menu.
2. If you have used standard heading styles within your document and need no customisation to your Table of contents, you may make a selection from one of the preset styles displayed.
3. Your table of contents will be inserted.

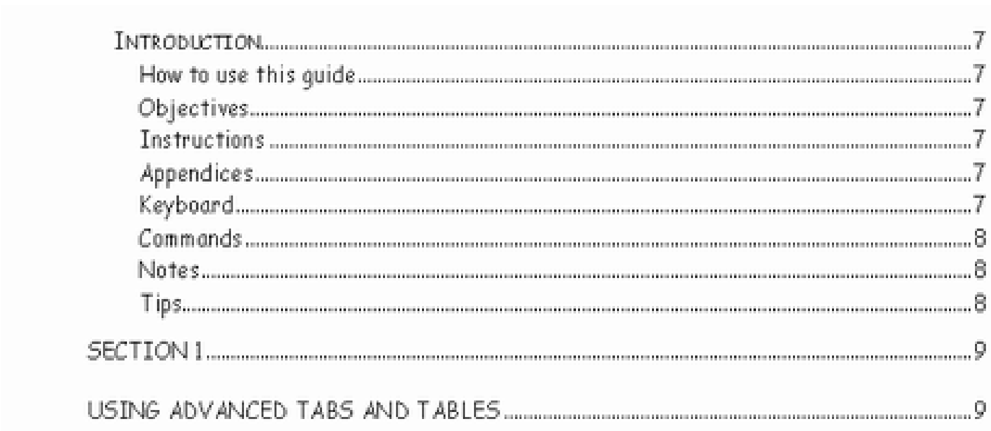
However

1. If you need some customisation select the **INSERT TABLE OF CONTENTS** choice at the end of the menu. A dialog will appear.



- *In the* ***GENERAL*** *section click on the drop down box to display different* ***FORMATS*** *(Classic, Distinctive, Fancy etc.), a preview is displayed on the top left. For each format, you can also modify some standard options:*
- ***SHOW LEVELS*** *use this to specify how many heading levels to include in the table of contents. The default is 3, which means Headings 1-3 are displayed.*
- ***SHOW PAGE NUMBERS*** *displays the page number for each heading*
- ***RIGHT ALIGN PAGE NUMBERs*** *aligns page numbers with the right margin*
- ***TAB LEADER*** *choose whether to have a blank space, dots, dashes or a solid line between the headings and the page numbers*

2. Click on **OK** to insert the table of contents.



- *The table of contents displays all the headings up to the value specified for **SHOW LEVELS**. Each heading and number is a separate paragraph, formatted using Word's TOC styles. Unless you specify otherwise, Heading 1 text uses TOC 1 style in the table of contents, Heading 2 uses TOC 2 style and so on.*

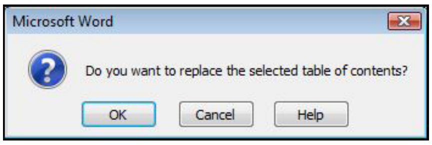
Modifying The Table Of Contents

The Table of Contents may need to be altered when you see the initial results.

› To change the number of heading levels to display in the table of contents:

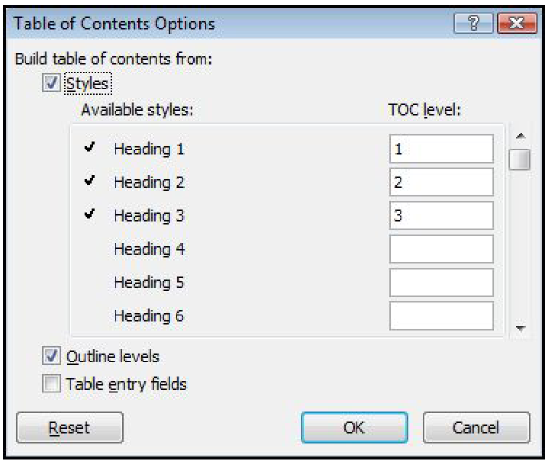
Mouse

3. Click in the table.
4. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **TABLE OF CONTENTS** button to display a menu. Select **INSERT TABLE OF CONTENTS** choice at the end of the menu to display dialog.
5. Change the **SHOW LEVELS** field and click on **OK.**
6. You will be prompted as to whether you want to replace the old table of contents with the new one. Click on **OK** to update the table.



Displaying User-Defined Headings Styles.

Using the **SHOW LEVELS** field means that you have to show at least Heading 1 text in the table of contents. However you may want to show Heading 2-3 text but not Heading 1.



To choose which headings to use:

Mouse

1. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **TABLE OF CONTENTS** button to display a menu. Select **INSERT TABLE OF CONTENTS** choice at the end of the menu to display dialog.
2. Click on the **OPTIONS** button
3. The **OPTIONS** dialog displays a number next to the Headings included in the table of contents. The TOC Level numbers tell Word which TOC style to apply to each Heading in the final table; typically Heading 1 is TOC 1, Heading 2 is TOC 2 and so on.
4. Delete the TOC level number next to Heading 1 (the tick automatically disappears)
5. Change the TOC level numbering for the other styles; E.G. to begin the Table of Contents listing using Heading 2 headings, change Heading 2 to TOC 1 and Heading 3 to TOC 2
   You do not have to alter the other TOC level numbering, Heading 2 can be left as TOC 2, but the final Table of Contents may not then be as easy to read.

6) Click on **OK** to return to the **INDEX AND TABLES** dialog, then **OK** to insert the table (Word prompts you to replace the old table)

Redisplaying Standard Heading Styles

In the table of contents, you can choose to display headings formatted with a style, which you have created. Repeat the process for changing the Headings. In the Options dialog, type a TOC level number next to the style(s) you want to use - these styles can be the ones you have created as well as or instead of the standard Heading Styles.

Resetting to display heading styles

When you change the styles to display, the **SHOW LEVELS** box disappears in the **INDEX AND TABLES** dialog, this is because the Table of Contents will use the styles selected in the **OPTIONS** dialog.

To go back to using only Heading Styles:

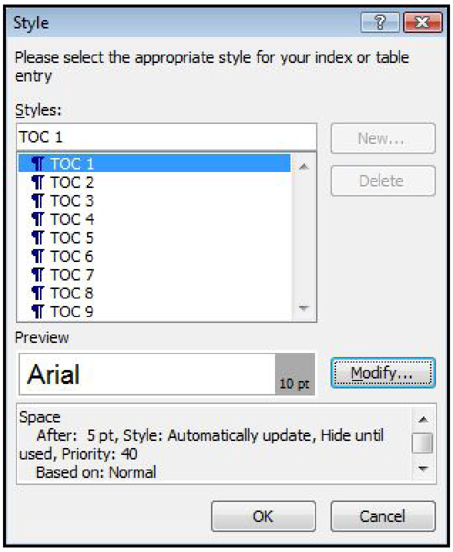
Mouse

1. In the **INDEX AND TABLES** dialog, click on the **OPTIONS** button
2. Click on the **RESET** button

The **SHOW LEVELS** box then reappears when you have clicked on **OK**.

Customising The Toc Levels

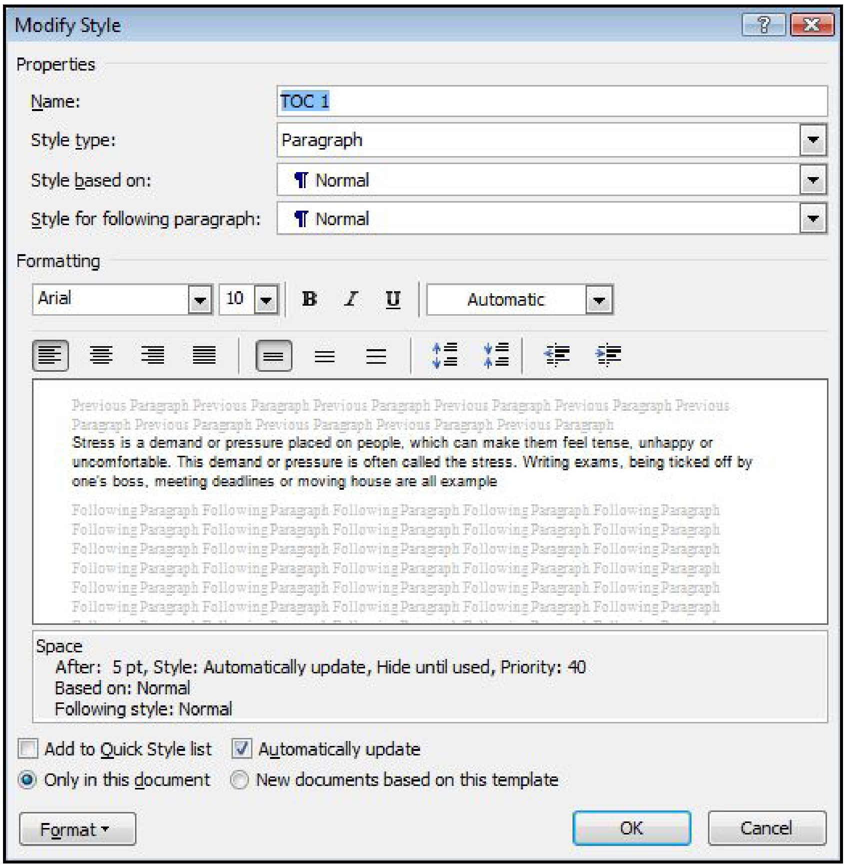
In the Insert, **INDEX AND TABLES** dialog, you can choose from 6 preset tables of contents styles. However, you may want to create a customised look.



To create a custom Table of Contents:

Mouse

1. Display the **TABLE OF CONTENTS** dialog, select the **MODIFY** button
2. A **STYLE** dialog is displayed, listing only the nine TOC level styles. To change the formatting of one of the TOC styles: Select the style
3. Click on the **MODIFY** button
4. In the **MODIFY STYLE** dialog, use the **FORMAT** button to change the formatting. Such as paragraph, font numbering tabs etc. Each selection displays a dialog box with all choices necessary to fully customise you TOC level style Click on **OK** when finished. Then either select another TOC style to modify, or close the **STYLE** dialog to return to the main **TABLE OF CONTENTS** dialog.
   You can also modify the TOC styles by following the process outlined in the "Redefining Standard Styles" Section.



Updating The Table Of Contents

The TOC field is the underlying element of a table of contents. If after inserting a table of contents, you then modify the document, you may need to update the table.

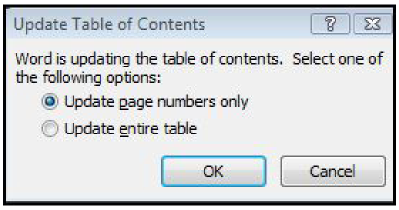
‣ <u>To update a Table of Contents:</u>

<u>Keyboard</u>

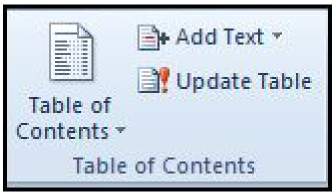
1. Click in or select the table, then press **F9**
2. You will be prompted to either **UPDATE PAGE NUMBERS ONLY**, or to **UPDATE ENTIRE TABLE.** Updating the page numbers is faster and can be used if the page numbers is the only part which has changed.

<u>Or</u>

<u>Mouse</u>



1. Click on the **REFERENCES** ribbon and go to the **TABLE OF CONTENTS** group. Click on the **UPDATE TABLE** button to display the **UPDATE TABLE OF CONTENTS** dialog as above.
2. Make a selection click **OK**.

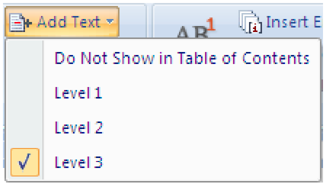


Manually Adding And Removing Entries.

A new little tool in Word 2010 is the **ADD TEXT** to table of contents tool found in the **TABLE OF CONTENTS** group on the **REFERENCES** ribbon. This allows you to manually go through your document selecting headings and either adding them to a particular TOC level or removing them from the Table of contents all together. Since your table of contents is based on styles however, this tool will change the formatting of the selected heading to whatever TOC level you apply to it. E.G. if a heading is assigned as a level 2 TOC entry it will assume the format of the heading 2 style.

To manually assign headings to the Table of contents

Mouse



1. Click on a heading that is not yet in your table of contents that you wish to appear there.
2. Click on the **ADD TEXT** button on the **REFERENCES** ribbon in the **TABLE OF CONTENTS** group.
3. Decide what level you wish that heading to appear at, and make the relevant choice.
4. The heading format of the selected heading will change to the assigned levels heading format.
5. Update table.

   Similarly if there is a heading in your table of Contents that you don't wish to appear there then go to the heading within the document and make the choice from the list for it not to appear in the table of contents. You may format any changed heading manually to whatever you wish DO NOT CHANGE THE STYLE ASSIGNED TO IT THOUGH. MERELY MANUALLY FORMAT THE TEXTS APPEARANCE.

The Toc Field

To display the TOC field code, click in the table of contents and press **SHIFT F9**.

{TOC \O "1-3"}

The \O "1-3" part of the field is a switch telling you which Heading Level styles the table of contents is searching for. There are other switches that you can include in this field. Two of the useful switches are described below:

\t Include this to add styles other than the Heading level styles.

E.G. ***ITOC \t*** *"chaptertitle,l,chapterhead,2"} builds a table of contents using paragraphs having the styles "chaptertitle" and "chapterhead." The number following each style name identifies the TOC entry level to assign the style in the table of contents.*

You can use the \o switch and the \t switch together to build a table of contents using a combination of built-in and user-defined styles.

\rl Builds a table of contents without page numbers. If a range of entry levels, such as "1-2," is specified, the TOC field builds a table of contents without page numbers for those entry levels. To suppress page numbering of TOC 1 entries, add the switch \n " 1 - 1 "

If you directly edit the field code, you should then press F9 to update the field

Indexes

To create an Index in Word, you first have to decide what text you want to appear in the index. This is done by marking text entries in your document. When you have marked the text, you can then insert the index (similar to inserting a table of contents).

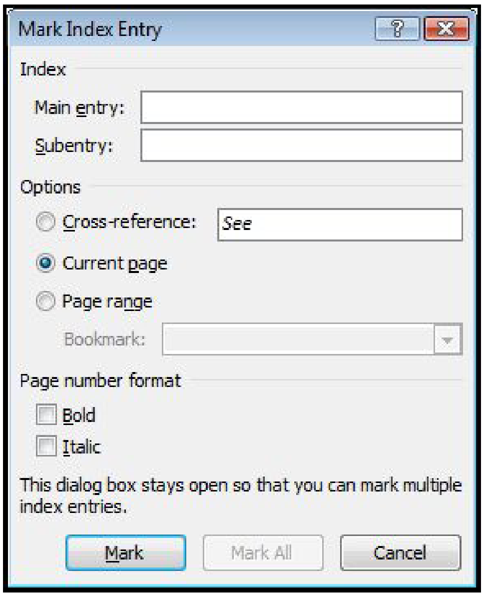
Marking Entries

There are two ways to mark text in your document so that it is included in the index. Either use the Mark Entry option in the Index and Tables dialog for each entry, or create a document containing all the entries that you want included in the index and use the AutoMark feature.

‣ To mark an entry for indexing:

Mouse

1. Select the text to be marked
2. Select the **MARK ENTRY** button from the **INDEX** group on the **REFERENCES** ribbon



Or

Keyboard

1. Press **ALT SHIFT X**

2. The subsequent dialog box that shows and its options are described below:-
3. When you have selected all the required options, (below) click on the **MARK** button to mark the text as an index entry

Main Entry

The Main entry: will be the text that you highlighted. You can change this if you want to display something slightly different in the final index. Typically you may just want to change the capitalisation of the text.

Subentry

This allows you to create a second level entry in the index. E.G. in this document there might be a Main Entry of "Table of Contents", whereas the Subentry might be "Updating the Table".

If you want to include a third level entry, after the Subentry type a colon ":" and the type the next subentry.

Options

CROSS-REFERENCE Use this if you want the entry to cross-reference with one of the other entries in the Index. The page number will not be displayed. The index entry might look like "Bookmarks, See Cross References"

CURRENT PAGE This is the default. It includes the page number with the index entry.

PAGE RANGE This allows you to include a bookmark, which covers more than one page, as an entry. For more information on creating a Bookmark see page 34.

The **PAGE NUMBER FORMAT**: options bold and *italic,* allow you to pre-format the page numbers that will appear in the index.

You don't have to close the dialog if you want to continue marking entries:

› To mark another entry:

Mouse

1. With the **MARK ENTRY** dialog still showing, click in the document and then find the next index entry
2. Select the text
3. Then click on the dialog
4. Choose any of the required options, then click on **MARK**
5. When you have finished marking index entries, click on the **CLOSE** button to return to the document.

Mark All

The **MARK ALL** button can be used instead of **MARK** when you want to mark an entry, which occurs several times in the document. This saves you having to mark each occurrence of this text yourself.

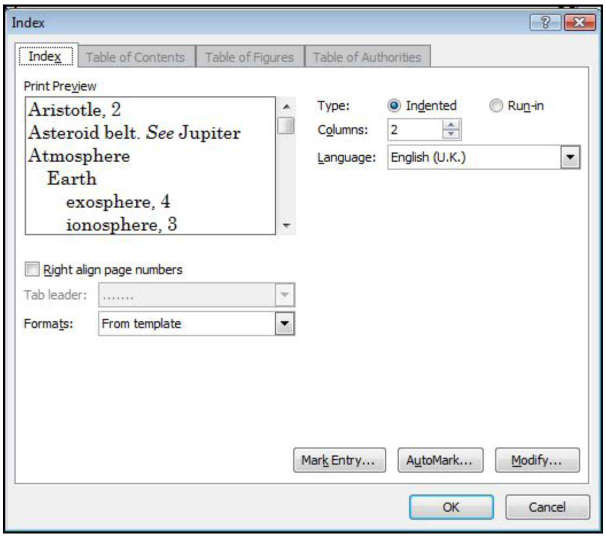
Creating The Index

Once the index entries have been marked, throughout your document you can insert the index.

To display the Index dialog:

Mouse

1. Position the insertion point where you want the index to appear, this is typically at the end of the document.



2. Choose **INSERT INDEX** from the **INDEX** group on the **REFERENCES** ribbon
3. Choose the Type of index:
- ***INDENTED** displays Subentries indented and below the corresponding Main Entry*
- ***RUN-IN** displays Subentries on the same line as the corresponding Main Entry*
4. Select one of the preset formats (a preview is displayed to the left, some of the formats include a tab leader and right align the page numbers)
5. Choose the number of columns (max. 4) to format the index with
6. Click on **OK**

Customising The Index

The generated Index is formatted using standard Index styles. Letter headings are formatted with the "Index Heading" style, Main Entries with "Index 1" style, Subentries with "Index 2" style and so on.

If you want to modify the style of the index, choose From template from the Formats list, then click on the **MODIFY** button. This displays a Style dialog previewing the available index styles.

Select the required style, then click on the **MODIFY** button and make the required style changes (this process is similar to customising a table of contents).

Alternatively you can modify the styles directly in the document.

Editing And Updating Indexes

You can edit an index by changing individual index entries in the document and then updating the index.

E.G. *if you wanted to remove an index entry, you would have to delete the original entry and then update the index, or if you added another index entry, then the Index would also need to be updated.*

- *If you want to delete the index entry, select the field and press DELETE.*
  When you mark index entries, Word inserts XE fields in the document. They are entered as hidden text, so to view them you have to click on the Show hidden text tool.

- *The fields are displayed just after the original marked text: or a bookmark* **{•XE•"Bookmark" •\b•\i•}** *in a document*

The text which is in "" is the actual text which is displayed in the index. This can be modified, but make sure you only change the text within the "". Subentries can be created, E.G. you might type "Bookmark: Creating"

There are some switches which can be included with this field:

\b Displays the page number in bold

\i Displays the page number in italics

\r Includes the range of pages marked by the specified bookmark.

E.G*. the field* ***{XE "Selecting text" \r SelectingText}*** *gives a result such as "Selecting text, 20-25" in the index, where SelectingText is the name of the bookmark.*

\t Inserts the text following the switch in place of a page number. Enclose the text in quotation marks.

- ***E.G****. the field* ***{XE "Highlighting" \t "See Selecting"}*** *gives the result "Highlighting, See Selecting" in the index.* ***If you do make changes to any of the index entry fields, you should then update the Index.***

Updating The Index

To update an index:

Keyboard

1. Click in or select the index and Press **F9**

OR

1. Click in the index and click on the update index button on the references ribbon.

Editing The Index

The **INDEX** field is the underlying element of the Index. To display the field code, click in it and press **SHIFT F9**. The field code for a "classic" indented index with 2 columns looks as follows: **{INDEX \h "—A--" \c "2"}**

The main reason for editing the Index field is to add or remove field switches. Some of the more useful ones are described on the next page:

Examples

\c Creates an index with more than one column on a page.

- ***E.G.*** *the field* ***{index \c "2"}*** *creates a two-column index. You can specify up to four columns.*

\e Defines the separator characters used between an index entry and its page number. You can use up to five characters and they must be enclosed in quotation marks.

- ***E.G****. the field* ***{index \e "; "}*** *gives a result such as "Inserting text; 3" in the index. The default separator characters are a comma and a space (,).*

\g Defines the separator characters used in a page range. You can use up to five characters and they must be enclosed in quotation marks.

- ***E.G.** the field **{index \g " to "}** gives a result such as "Finding text, 3 to 4." The default separator character is a hyphen.*

\h Inserts headings formatted with the Index Heading style between groups in the index. Enclose the heading in quotation marks,

- ***E.G. {index \h "A"}** or **{index \h "AAA"}**. Word automatically advances through the alphabet for each alphabetic group in the index. A space, **{index \h " " 1}**, inserts a blank line between alphabetic groups.*

\l Defines the separator characters used between page numbers for entries with multiple-page references. You can use up to five characters and they must be enclosed in quotation marks.

- ***E.G.** the field **{index \1 " or "}** gives a result such as "Inserting text, 23 or 45 or 66" in the index. The default separator characters are a comma and a space (,).*

\p Limits the index to the specified letters.

- ***E.G**. the field **{index \p a-m}** generates an index for only the letters A to M.*

\r Runs index subentries onto the same line as the main entry. Main entries are separated from subentries by colons (:) and subentries are separated by semicolons (;).

- ***E.G** The field **{index \rl}** gives a result such as the following: "Text: inserting 5, 9; selecting 2; deleting 15.*

Automark

The alternative way of marking index entries is to use the AutoMark feature. First you have to create a separate document, known as an AutoMark file. This file needs to contain the text entries that should be marked for the index, and the corresponding text that you want to display in the index. The text entries are case sensitive. So it is wise to include different combinations of the same text.

In the AutoMark file, create a table with two columns. Enter the text to be marked in the first column. In the second column enter the corresponding index entries (these will appear as Main Entries in the index). Save the AutoMark file and return to the document where you want to mark the index entries. From the Index and Tables dialog, click on the AutoMark button. This displays an Open Index AutoMark File dialog from which you need to select the name of the AutoMark File.

Once the name of the AutoMark File has been selected, click on **OK**. Word then automatically searches the current document for all instances of the words and phrases contained in the AutoMark File, and marks them as index entries.

Cross-Referencing Text

The cross-referencing feature in Word enables you to refer to the page number of a heading or a bookmark in a document. E.G. "for more information on Indexes see page 46". You can also use cross-references to refer to the actual text.

The advantage of using cross-referencing is that the results are stored in a field. This means that if the referenced text is moved to another page, the cross-reference can be updated by simply updating the field.

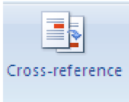
If your cross-reference needs to refer to the page number of a particular item, (e.g. "see index on page 78"), the method described below will automatically produce the relevant page number.

Heading Cross-References

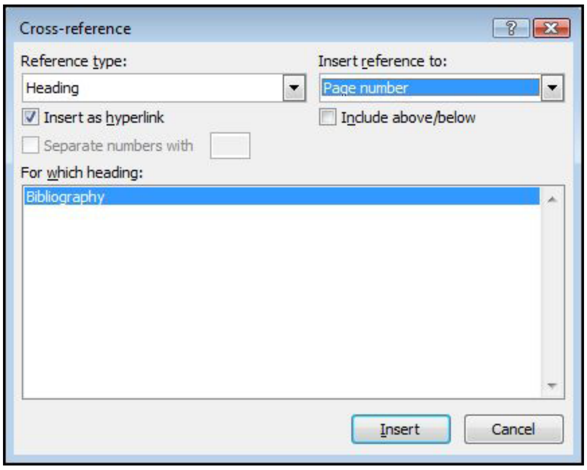
If you are using the standard Word Heading Level styles (Heading 1-9) in a document, then you can use cross-references to refer to the page number, heading number and the text of any of the headings.

▸ To produce a cross-reference to a page number:

Mouse



1. Type in the required introductory text. E.G. "see Indexes on page"



2. Then select the **CROSS REFERENCE** button in the **LINKS** group on the **INSERT** ribbon, a dialog appears
3. Select Heading in the **REFERENCE TYPE:** list
4. Select **PAGE NUMBER** from the **INSERT REFERENCE TO:** list
5. Select the name of the required heading in the **FOR WHICH HEADING:** list
6. Click on the **INSERT** button

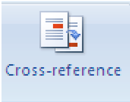
The generated page number is a {PAGEREF} field. To view the field, highlight the number and press **SHIFT F9**. Word automatically creates a numbered reference in the field code; this number uniquely relates to the selected heading. The field code would look similar to this:

{PAGEREF _Ref440091741}

- *Cross-references can be inserted as hyperlinks, i.e., when you position your mouse over the field, the mouse pointer turns into a pointing hand. If you were to click, you would be transported to that location. If you don't want the Cross-reference as a hyperlink, be sure to uncheck the* ***INSERT AS HYPERLINK*** *box in the Cross-reference dialog.*

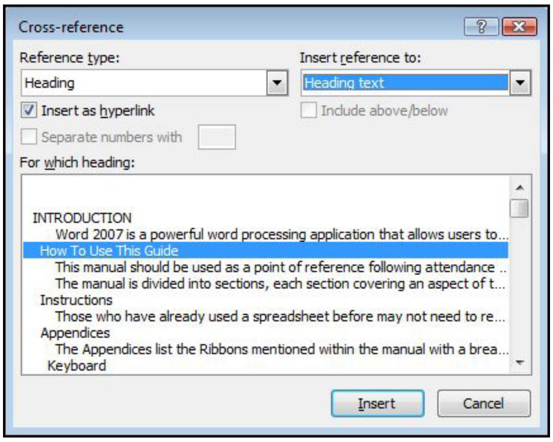
Referencing Heading Text

A heading text reference displays the actual text. In the previous example "see Indexes on page 46", the text "Indexes" can also be cross-referenced from the heading.



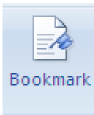
‣ To insert a cross-reference to a heading:

Mouse



1. Select the **CROSS REFERENCE** button in the **LINKS** group on the **INSERT** ribbon, a dialog appears
2. Select Heading in the **REFERENCE TYPE:** list
3. Select **HEADING TEXT** in the **INSERT REFERENCE TO:** list
4. Choose the name of the required heading in the **FOR WHICH HEADING:** list
5. Click on the **INSERT** button

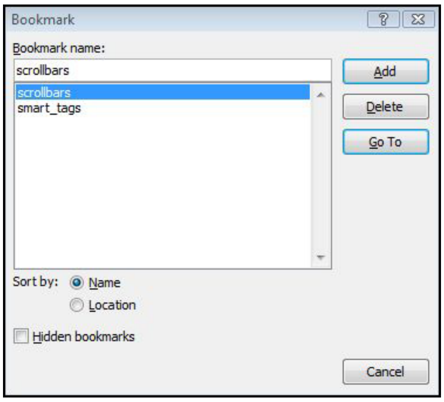
Bookmarks



Bookmarks should be used when you want to reference a piece of text, which is not formatted with one of the standard Heading styles.

‣ To create a bookmark:

Mouse



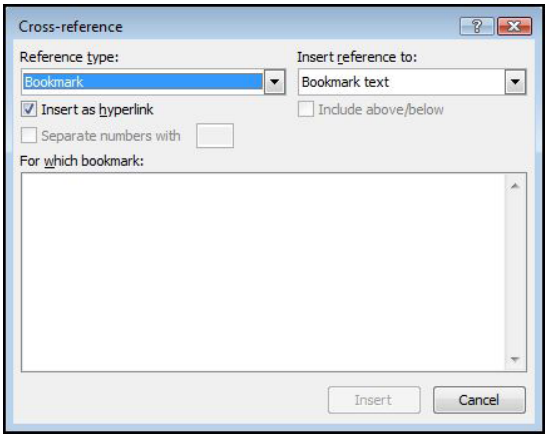
1. Select the text where you want to create the bookmark
2. Choose **BOOKMARK** from the **INSERT** ribbon, **LINKS** group.
3) Type in a name for the bookmark and click on the **ADD** button
A bookmark name cannot contain spaces, must not begin with a number, but can have up to a maximum of forty characters.

Referencing A Bookmark

The procedure is similar to referencing Headings.

To create a bookmark cross-reference:

Mouse



1. Select the **CROSS REFERENCE** button in the **LINKS** group on the **INSERT** ribbon
2. Select Bookmark from the **REFERENCE TYPE:** list
3. Select either **BOOKMARK TEXT** or **PAGE NUMBER** depending on the reference required
4. Choose the Bookmark from the **FOR WHICH BOOKMARK:** list and click on the **INSERT** button.

Updating Cross-References

Cross-references may need to be updated if the text they are relating to is moved on to a different page or if the text altered.

To update a cross-reference:

Keyboard

1. Click in or select the generated cross-reference field
2. Press **F9**

Or

Mouse

1. Right click the cross reference field containing the page number or heading text.
2. Select **UPDATE FIELD** from the menu
   If you want to update all the cross-references in the document, first select the document and then press** F9**. Any other fields in the document will also be updated.

Deleting A Cross Reference

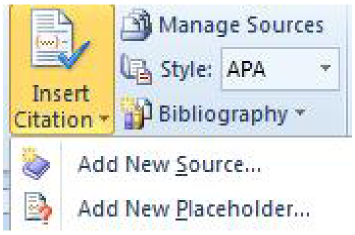
To delete a cross reference

Keyboard

1. Highlight the cross reference field
2. Press **DELETE** on the keyboard

   If the field was not selected in its entirety then you may need to press the *delete* ***key twice***

Citations and Bibliographies



A bibliography is a list of sources, usually placed at the end of a document, which you consulted or cited in creating the document. In Microsoft Office Word 2010, you can automatically generate a bibliography based on the source information that you provide for the document.

Each time that you create a new source, the source information is saved on your computer, so that you can find and use any source you have created.

Create Citation Sources

When you add a new citation to a document, you also create a new source that will appear in the bibliography.

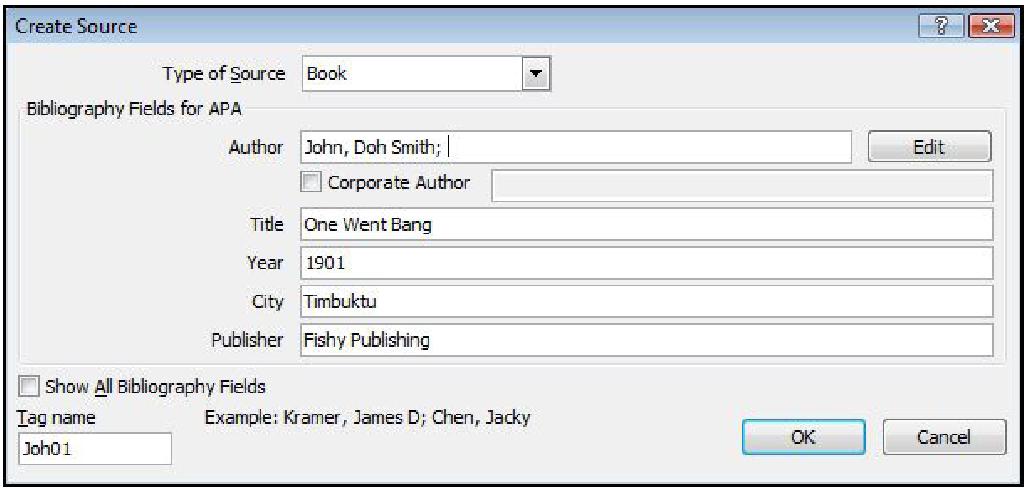
To create a new source

Mouse

1. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click **ADD SOURCE**

OR

1. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click, **INSERT CITATION.**
2. To add the source information, click **ADD NEW SOURCE**. A dialog will appear
3. Begin to fill in the source information by clicking the arrow next to **TYPE OF SOURCE**.
- ***E.G***. *your source might be a book, a report, or a Web site.*
4. Fill in as much information as you have available this source can be edited at any time. To add more information about a source, click the **SHOW ALL BIBLIOGRAPHY FIELDS** check box.



5. This source can be inserted many times within your document it will appear in the **INSERT CITATION** Menu.

- *To find additional sources, or additional information about sources that you are citing, click* ***INSERT CITATIONS****, and then click* ***SEARCH LIBRARIES****. For example, you can search a library database for every match of a particular topic in that library's collection. Then, with a single click, you can insert the citation in the document, or you can add the source information to the current list of sources for later use.*

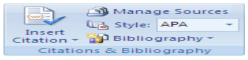
- *If you choose a **GOST** or **ISO 690** style for your sources and a citation is not unique, append an alphabetic character to the year. For example, a citation would appear as [Pasteur, 1848a].*
- *If you choose **ISO 690**-Numerical Reference and your citations still don't appear consecutively, you must click the **ISO 690** style again, and then press **ENTER** to correct order the citations.*

Manage Sources

The list of sources that you consult or cite can become quite long. At times you might search for a source that you cited in another document by using the **MANAGE SOURCES** command.

To manage citation sources

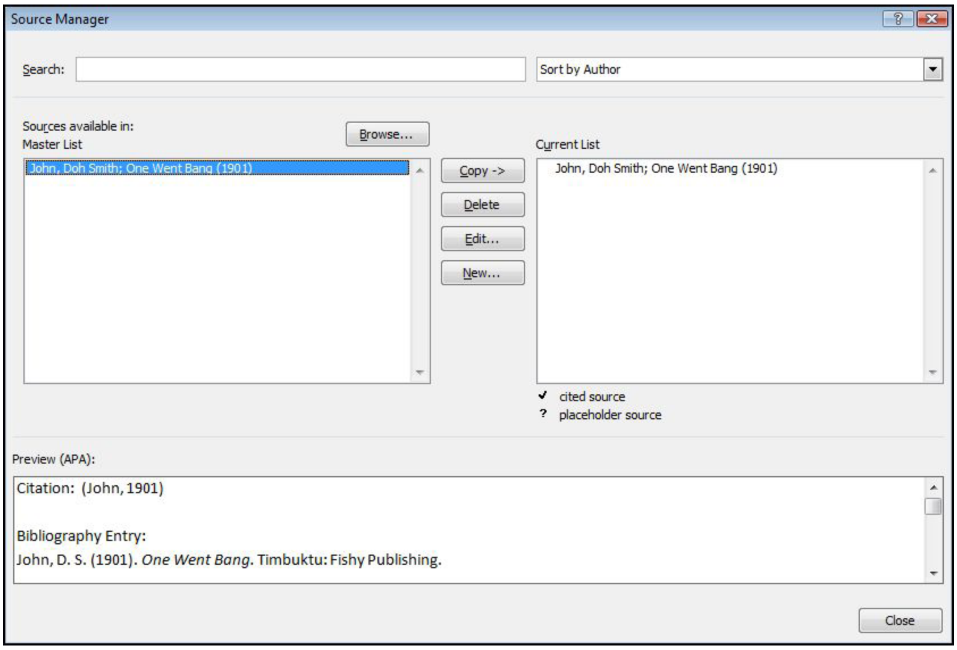
Mouse



1. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click, **MANAGE SOURCES**.
2. If you open a new document that does not yet contain citations, all of the sources that you used in previous documents appear under **MASTER LIST**.
   If you open a document that includes citations, the sources for those citations appear under *CURRENT LIST*, ***and all sources that you have cited, either in previous documents or in the current document, appear under*** *MASTER LIST*.

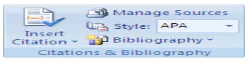
3. To find a specific source, either:

- *In the **SORTING** box, sort by author, title, citation tag name, or year, and then search the resulting list for the source that you want to find.*
- *In the **SEARCH** box, type the title or author for the source that you want to find. The list dynamically narrows to match your search term.*
- *You can click the **BROWSE** button in **SOURCE MANAGER** to select another master list from which you can import new sources into your document. For example, you might connect to a file on a share, on a research colleague's computer or server, or on a Web site that is hosted by a university or research institution.*



Edit A Citation Placeholder

Occasionally, you may want to create a placeholder citation, and then wait until later to fill in the complete bibliography source information. Any changes that you make to a source are automatically reflected in the bibliography, if you have already created one. A question mark appears next to placeholder sources in Source Manager.



To edit a placeholder

Mouse

1. To add a placeholder, so that you can create a citation and fill in the source information later, click **ADD NEW PLACEHOLDER**. A question mark appears next to placeholder sources in **SOURCE MANAGER**.
2. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click, **MANAGE SOURCES**.
3. Under **CURRENT LIST,** click the placeholder that you want to edit.
   Placeholder sources are alphabetized in Source Manager, along with all other sources, based on the placeholder tag name. Placeholder tag names are numbers by default, but you can customize the placeholder tag name with whatever tag you want.

4. Click **EDIT**.
5. Begin to fill in the source information by clicking the arrow next to **TYPE OF SOURCE.**
6. Fill in the bibliography information for the source. Use the **EDIT** button to fill in fields instead of having to type names in the appropriate format. To add more information about a source, click the Show All Bibliography Fields check box.

Create A Bibliography

You can create a bibliography at any point after you insert one or more sources in a document. If you don't have all of the information that you need about a source to create a complete citation, you can use a placeholder citation, and then complete the source information later.

Placeholder citations do not appear in the bibliography.

‣ To create a bibliography

Mouse

1. Click where you want to insert a bibliography, usually at the end of the document.
2. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click, **BIBLIOGRAPHY**.

3. Click a predesigned bibliography format to insert the bibliography into the document.

Changing The Style Of The Bibliography

To change the style of the Bibliography

Mouse

1. Click within your bibliography
2. On the **REFERENCES** ribbon, in the **CITATIONS & BIBLIOGRAPHY** group, click the arrow next to **STYLE**.

3. Click the style that you want to use for the citation and source. E.G. social sciences documents usually use the **MLA** or **APA** styles for citations and sources.

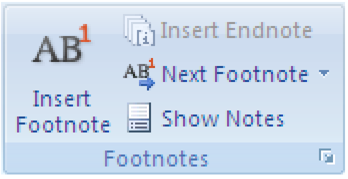
Section 7 Footnoes and Endnotes

<u>By the end of this section you will be able to:</u>

- Insert footnotes and endnotes in a document
- View and edit footnotes and endnotes
- Delete footnotes and endnotes
- Customise footnotes and endnotes

Using Footnotes

Footnotes and Endnotes are used to provide additional information about a word or phrase within a document. The text is marked with a small, superscripted number. If you insert a footnote, the associated text can be placed either at the bottom of the page or beneath the last paragraph of text on the page. An endnote can be displayed either at the end of the section or at the end of the whole document. Both footnotes and endnotes are separated from the remainder of the text by a small horizontal line.

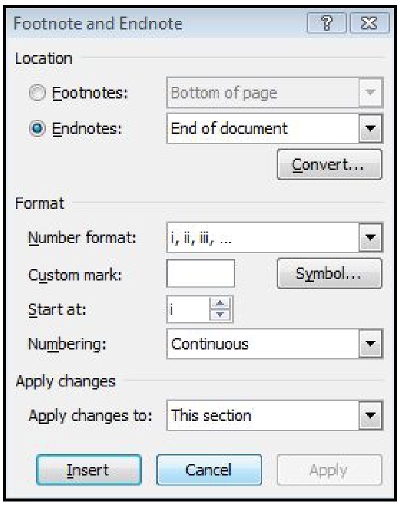


Inserting Footnotes

Footnotes can be inserted in any of Word's standard views

To insert a footnote:

Mouse

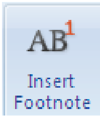


1. Position the insertion point after the word to be referenced, or select the text.
2. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog

3. You may in this dialog set the style of the footnotes you are going to use,
- *Choose the number format*
- *How you want the numbering to run.*
- *To apply to this section or whole document.*
- *Choose whether you want footnotes or endnotes*
4. Click on **INSERT** to insert the footnote

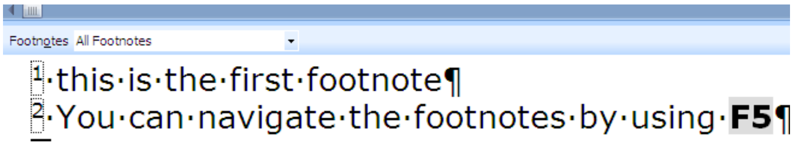
Or Mouse

1. Position the insertion point after the word to be referenced, or select the text.
2. Click on the **INSERT FOOTNOTE** button and type footnote text.



3. Double click the footnote number to take you back to your correct position in the document.
- *If you are in **DRAFT** or **OUTLINE** view when you insert a footnote, a **FOOTNOTE PANE** window is opened. (If you are in **PRINT LAYOUT** view, Word takes you to the bottom of the page). Type in the text for the footnote in the windowpane, click on the **CLOSE** button to return to the document*

Viewing Footnotes



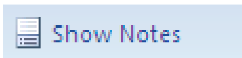
You will always be able to view and edit your footnotes when you are working in **PRINT LAYOUT** view. However if you are in **DRAFT** or **OUTLINE** View you should choose **SHOW NOTES** from the **FOOTNOTES** group.

The **FOOTNOTE PANE** is opened, displaying all the footnotes you have inserted. As you move between the different footnotes in the footnote window, the marked text from the document is displayed above.

Finding A Footnote Mark

To move to footnote markers:

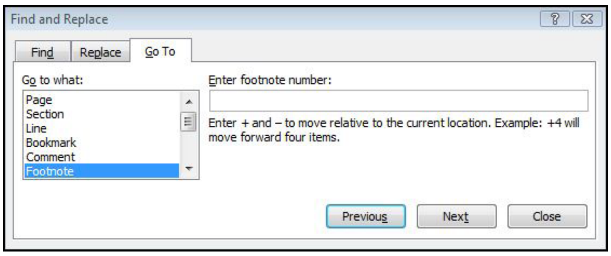
Mouse



1. Open the footnote pane as described previously and move to the required footnote

Or

Keyboard

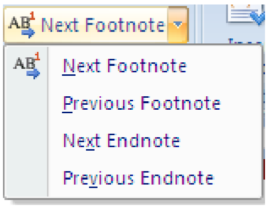


1. Press the **F5** key (Go To) when you are in the document. When you press **F5**, a dialog is displayed:
2. Choose **FOOTNOTE** from the **GO TO WHAT**: list
3. To find the next footnote in the document, type +1 in the footnote number and click on the **GO TO** button or the **NEXT** button.
4. To find the previous footnote, type in -1 and click on the **GO TO** button or the **PREVIOUS** button.

5. You can also find a specific footnote by typing in the footnote number and clicking on **GO TO**.
6. When you have used one of the above methods, Word takes the insertion point to the relevant footnote mark. You can then Go To another footnote or close the dialog.

<u>Or</u>

<u>Mouse</u>



1. Click on the drop down arrow next to the next footnote button in the footnote group and make a choice from the selection which direction you wish to go.

Editing And Deleting Footnotes

➤ <u>To edit a footnote:</u>

<u>Mouse</u>

1. Choose **SHOW NOTES** from the **FOOTNOTES** group, scroll to the footnote and make the required changes.

➤ <u>To delete a footnote:</u>

<u>Keyboard</u>

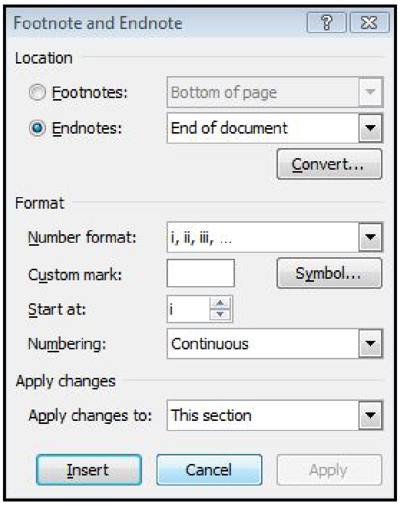
1. The only way to delete a footnote is to select the footnote reference mark in the text of the document and then press **DELETE**.
   Any remaining footnotes will automatically renumber.

Customising Footnotes

There are various parts of a footnote that you may want to change: the position of the footnote; the style of the numbering; controlling the sequence of footnote numbering. These features can be chosen when you first insert a footnote, or you can edit a footnote mark, which you have already inserted.

› To change the style of an individual footnote:

Mouse



1. Select the relevant footnote mark or position the cursor in the footnote pane, or if it is a new footnote, position the insertion point where you want the footnote mark to appear. Some customising, affects all footnotes, even if you are initially selecting an individual footnote or inserting a new one.
2. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog

3. To change the footnote marker, either click in the **CUSTOM MARK** box and type in the symbol, or click on the **SYMBOL** button to select the character you want to use.
4. To keep restart numbering in each section or continue throughout document, click on the **NUMBERING** drop down button
5. Choose the style of numbering from the **NUMBER FORMAT**: drop-down button.
   Changing the style of numbering will normally affect ALL footnotes in the document.

Changing The Position Of All Footnotes

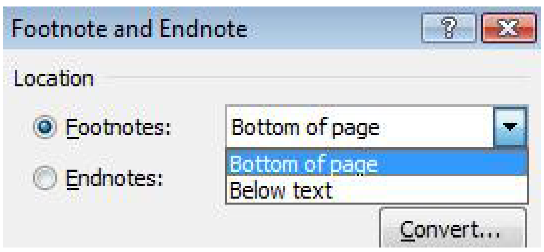
All footnotes can either be placed at the bottom of the page, or beneath the last line of text on that page. By default, Word displays footnotes at the bottom of the page.

▸ To change footnote position:

Mouse

1. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog

2. Select **BELOW TEXT** from the drop-down
3. Click on **INSERT** again to insert a new footnote and modify the current footnotes.



Changing The Number Sequencing

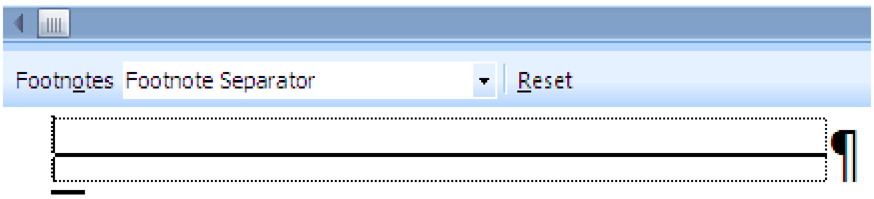
When you insert a footnote, Word automatically applies the next available number. However, you can make the numbering always restart on a new page or in a new section.

To change footnote number sequence:

1. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog
2. Click on the **NUMBERERING** Dropdown
3. Choose the restart option you require (continuous is the default)
4. Click on **INSERT** to complete.

Customising The Separator Style

Footnotes are separated from the text on the page by a 2-inch horizontal line. You can change the length of the line, its style or simply remove it.



To change footnote separator style:

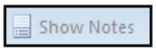
Mouse

1. In **DRAFT** or outline View click on the **SHOW NOTES** button from the **FOOTNOTE** group
2. In the **FOOTNOTES PREVIEW PANE** (bottom of screen)
3. Then select **FOOTNOTE SEPARATOR** from the drop-down list
4. Make the required changes to the separator or insert your own using Borders.
5. Switch views to **PRINT LAYOUT** or click on the **SHOW NOTES** button again.

- *If you ever want to return to the default footnote separator, repeat the process above and click on the **RESET** button.*
- *You can also modify the **FOOTNOTE CONTINUATION SEPARATOR** and its corresponding Notice in the same way. These would only be relevant where footnotes exceed the length of one page.*

Create A Footnote Or Endnote Continuation Notice

If a footnote or endnote is too long to fit on a page, you can create a continuation notice to let readers know that a footnote or endnote is continued on the next page.



<u>To create a continuation notice</u>

<u>Mouse</u>

1. Make sure that you are in **DRAFT** view
2. On the **REFERENCES** ribbon, in the **FOOTNOTES** group, click, **SHOW NOTES**.
3. If your document contains both footnotes and endnotes, a message appears. Click **VIEW FOOTNOTE AREA** or **VIEW ENDNOTE AREA**, and then click **OK**.
4. In the note pane list, click **FOOTNOTE CONTINUATION NOTICE** or **ENDNOTE CONTINUATION NOTICE**. In the note pane, type the text that you want to use for the continuation notice. For example, type **ENDNOTES CONTINUED ON THE NEXT PAGE**.

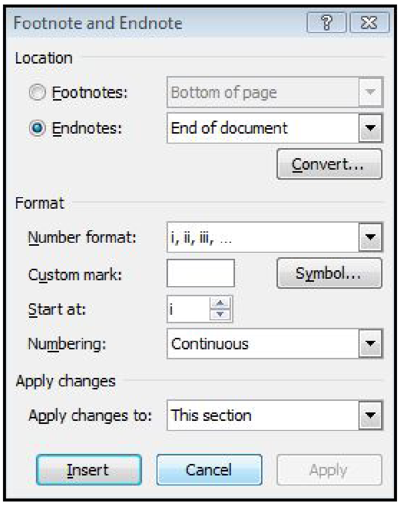
Using Endnotes

Many of the procedures for an endnote are similar to those outlined for footnotes on the previous pages. Where they differ is that an endnote can either appear at the end of the current section, or at the end of the whole document.

Inserting Endnotes

› To insert an endnote:

Mouse



1. Position the insertion point after the word to be referenced, or select the text.
2. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog

3. Endnotes are, by default, positioned at the end of the document and are numbered with roman numerals. To change either of these, click on the **OPTIONS** button, and select the required choices from the **PLACE AT:** and **NUMBER FORMAT:** options.
4. Click on **INSERT** to insert the endnote

Or Mouse

1. Position the insertion point after the word to be referenced, or select the text.
2. Click on the **INSERT ENDNOTE** button and type endnote text.
3. Double click the endnote number to take you back to your correct position in the document.
4. You can also specify whether endnotes should have continuous numbering or should restart in each section. This would only be relevant if you were displaying the endnotes at the end of each section.

Viewing Endnotes

‣ <u>To view all Endnotes:</u>

<u>Mouse</u>

1. Switch to **DRAFT** or **OUTLINE** view
2. Choose **SHOW NOTES** from the **FOOTNOTES** group
3. Select **ALL ENDNOTES** from the drop-down list at the top-left of the **FOOTNOTE PANE**

Finding

Endnotes, like footnotes, can be found using the **F5** key:

‣ <u>To find an endnote:</u>

<u>Keyboard</u>

Press **F5** and follow the procedures explained for footnotes

Editing And Deleting

To edit an endnote, first display All Endnotes in the footnote pane, then make changes to the relevant endnote.

To delete an endnote, select the endnote reference mark in the text of the document and then press **DELETE**.

The Endnote separators can also be modified or deleted. You would need to first view the footnote pane, and then display All Endnotes. The rest of the processes are outlined in the section Customising the Separator Style

Convert Footnotes To Endnotes

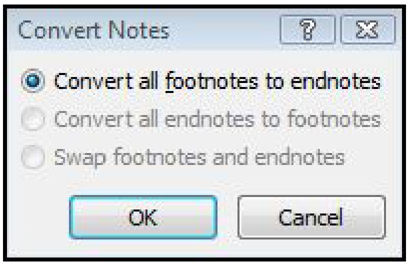
Footnotes can be converted to endnotes and vice versa

‣ <u>To convert an endnote</u>

<u>Mouse</u>

1. Locate your endnotes or footnotes and have your flashing cursor at that point.
2. Choose the **FOOTNOTE** dialog launcher from the **FOOTNOTES** group on the **REFERENCES** ribbon to open the **FOOTNOTE AND ENDNOTE** dialog.

3. Click on the **CONVERT** button to launch **CONVERT NOTES** dialog
4. Make a selection and click **OK**.



Section 8 Reviewing

By the end of this section you will be able to:

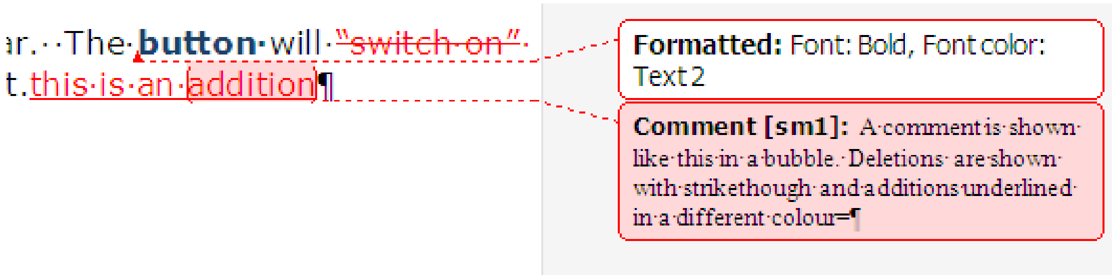
- Switch on the track changes
- Review revisions
- Lock a document to prevent changes
- Print revisions

Track changes (revision marks)

The Track Changes facility allows a person who is proofing a document to mark all their suggested additions and deletions on-screen, E.G. additions can be underlined and deletions struck through. The document can then be proofed further and the appropriate corrections ultimately removed or added. This is more efficient than marking revisions on a paper copy which then have to be typed in. It is also more economic as the document need only be printed when the final version is ready.

If more than one person makes revisions to a document, their revision marks will be displayed in a different colour. Also when you come to either accept or reject the revisions, Word displays who made the revision and on what date.

Use the improved Reviewing toolbar for document collaboration. Tracked changes are represented by clear, easy-to-read markup that doesn't obscure the original document or affect its layout. Markup is displayed while tracked changes are turned on, and also as the result of a comparison between two versions of a document.



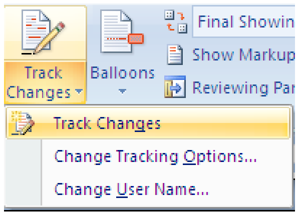
- *Balloons show comments and formatting changes in print preview.*

Word also has enhanced compare and merge features. In addition to integration with tracked changes, improvements include overall accuracy and robustness, the tracking of more types of changes, and the option to create a third document that contains the comparison.

Distributing a document for review is a complete, integrated process. When you send a document for review, Word automatically creates a review request form; enables and displays the reviewing tools when a reviewer receives the document; and prompts you to merge changes when the reviewed copy is returned. You can then use the reviewing tools to accept or reject the changes

Tracking Changes

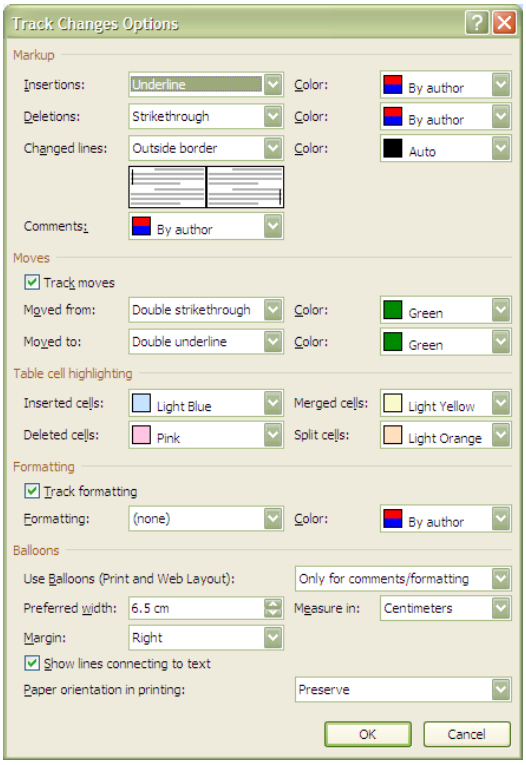
When you make revisions, a vertical line is displayed to the left of the line containing the revision. Use the **CHANGE TRACKING OPTIONS** from the drop-down menu from the **TRACK CHANGES** button to specify whether you want a vertical line, (**CHANGED LINES** option) and if you do, where to position it (to the left or right of the paragraph, or as an outside border).



To set up a document to track changes made:

Mouse

1. Choose the drop down arrow on the **TRACK CHANGES** button in the **TRACKING** group on the **REVIEW** ribbon and select **TRACK CHANGES** from the menu.



2. Inserted Text will by default be underlined. Deleted Text will be struck through. Alternatively it can be shown in a balloon.
3. For Inserted and Deleted Text, the colour of both types of revisions will be specific to the Author (the person making the revision). This is up to a maximum of 8 authors.
4. Click on **OK** to start marking revisions.

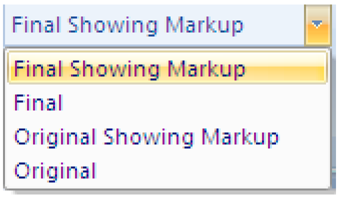
Track change options

When you open a document that contains revision marks, you can either continue to make more revisions, or review the current revisions - accepting, rejecting or leaving them for later. If someone else has made revisions before you there revision colour will be different from yours these colours can be changed by the **TRACK CHANGES OPTIONS**.

‣ <u>To Hide revision marks:</u>

<u>Mouse</u>

1. Choose The drop down box showing **FINAL SHOWING MARKUP** and choose just **FINAL** which will hide all the revisions and show you the document with all changes but unmarked.

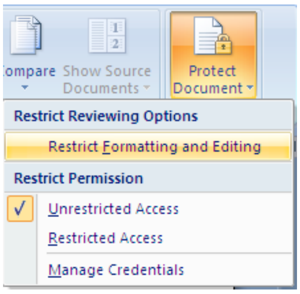


Turning Off Track Changes

To continue editing as normal without marking the changes, you need to turn the changes off.

To switch Track Changes off:

Mouse



1. Choose the drop down arrow on the **TRACK CHANGES** button in the **TRACKING** group on the **REVIEW** ribbon and select **TRACK CHANGES** from the menu. This will now turn off the track changes facility.

Protect tracked changes in a Document

If you save a file with the Track Changes switched on, then any other person who opens the file will automatically be marking revisions when they edit the text. Although, they could turn off the Track Changes and edit as normal.

To prevent someone from turning the Track Changes feature off, you would need to lock the document. You can also include a password, so that only users who know the password can then unlock the document and turn off the Track Changes. The original author would still be able to edit the document and accept or reject the revisions.

To lock a document:

Mouse

1. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.

2. In the **EDITING RESTRICTIONS** area of the task pane, select **TRACK CHANGES**
3. Click on **YES, START ENFORCING PROTECTION**
4. Enter a password in the dialog box that appears if you wish.
5. Click **OK**

To unlock a protected document:

Mouse

6. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
7. At the bottom of the task pane click on the **STOP PROTECTION** button
8. You will be prompted to enter the password if one was originally added.

   Encryption to protect against malicious users needs windows rights management and a Digital signature

Reviewing the changes

As you review tracked changes and comments, you can accept or reject each change. Until you accept or reject all tracked changes and comments in a document, even hidden changes will appear to viewers in documents you send or display.

Review A Summary Of Tracked Changes

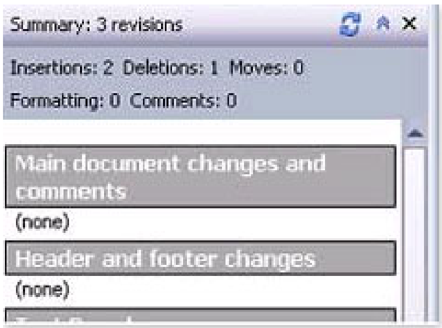
The Reviewing Pane is a handy tool for ensuring that all tracked changes have been removed from your document and won't show up to others who might view your document. The summary section at the top of the Reviewing Pane displays the exact number of visible tracked changes and comments that remain in your document.

The Reviewing Pane also allows you to read long comments that do not fit within a comment bubble.

The Reviewing Pane, unlike the document or the comment bubbles, is not the best tool for making changes to your document. Instead of deleting text or comments or making other changes in the Reviewing Pane, make all editorial changes in the document. The changes will then be visible in the Reviewing Pane.

To review changes in the reviewing pane

Mouse

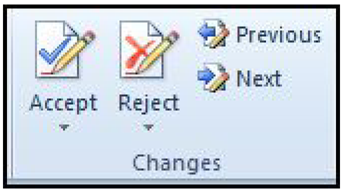


1. On the **REVIEW** ribbon, in the **TRACKING** group, click **REVIEWING PANE** to view the summary at the side of your screen. To view the summary across the bottom of your screen instead of on the side of your screen, click the arrow next to **REVIEWING PANE**, and then click **REVIEWING PANE VERTICAL**.
To view the number of each type of change, click on the vertical chevron on the top right of the reviewing pane to Show Detailed Summary.

To review each tracked change and comment in sequence

Mouse

1. On the **REVIEW** ribbon, in the **CHANGES** group, click **NEXT** or **PREVIOUS**.
2. Do one of the following:

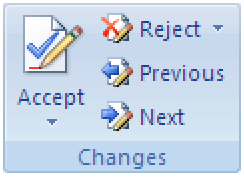


- *In the **Changes** group, click **Accept**.*
- *In the **Changes** group, click **Reject**.*
- *In the **Comments** group, click **Delete**.*

3. Accept or reject changes and delete comments until there are no more tracked changes or comments in your document.
   To ensure all tracked changes are accepted or rejected and that all comments are deleted, on the *REVIEW* ***ribbon, in the*** *TRACKING* ***group, click*** *REVIEWING PANE*. ***The summary section at the top of the*** *REVIEWING PANE* ***displays the exact number of tracked changes and comments that remain in your document.***

To Accept all changes at once

Mouse



1. On the **REVIEW** ribbon, in the **CHANGES** group, click **NEXT** or **PREVIOUS**.
2. Click the arrow below **ACCEPT**, and then click, **ACCEPT ALL CHANGES IN DOCUMENT**.

To Reject all changes at once

Mouse

1. On the **REVIEW** ribbon, in the **CHANGES** group, click **NEXT** or **PREVIOUS**.

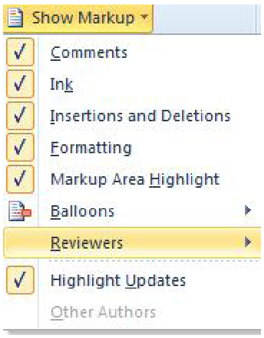
2. Click the arrow beside **REJECT** , and then click **REJECT ALL CHANGES IN DOCUMENT**.

To review changes by type of edit or by a specific reviewer

Mouse

1. On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. And Clear all check boxes except for the ones next to the types of changes that you want to review.

Or



1. On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**.
2. Point to **REVIEWERS**, and then clear all check boxes except for the ones next to the names of the reviewers whose changes you want to review.

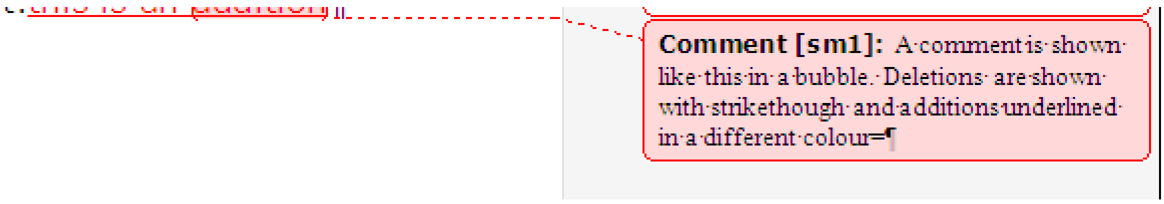
- *To select or clear the check boxes for all reviewers in the list, click **ALL REVIEWERS**.*

3. Accept or reject changes as previously discussed

Comments

Comments are initialled and numbered annotations that are written and appear in a special pane (like footnotes and endnotes) so that they do not affect the document text. The feature is useful if you are reviewing a document and merely want to make suggestions or comments rather than actually make editing changes or revision marks.

An addition to this feature is the ability to "lock" a document against editing changes being made by anyone other than the author, but still allow comments to be added. This means the document cannot be altered.



Inserting A Comment

To add a comment to a document:

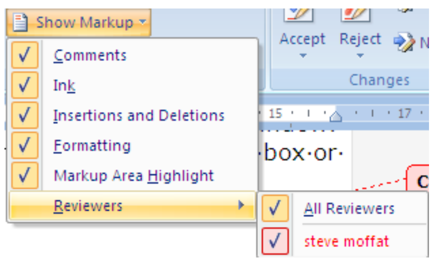
Mouse

1. Position the insertion point next to the text to be commented upon
2. Choose **NEW COMMENT** from the **COMMENTS** group on the **REVIEW** ribbon.
3. In the Comment bubble to the right, your initials will be displayed and next to these you can type in your text.
4. A dotted line will lead to the insertion point of the comment.

To View comments by a specific person

If several people have added comments, you can view those made by one person:

Mouse



1. On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. Point to **REVIEWERS**, and then clear all check boxes except for the ones next to the names of the reviewers whose comments you want to review.
2. On the **REVIEW** ribbon, in the **TRACKING** group, click the arrow next to **SHOW MARKUP**. clear all check boxes except for the comments one you want to review.
3. Use the **NEXT** and **PREVIOUS** buttons on the **COMMENTS** group to move through your comments for that person

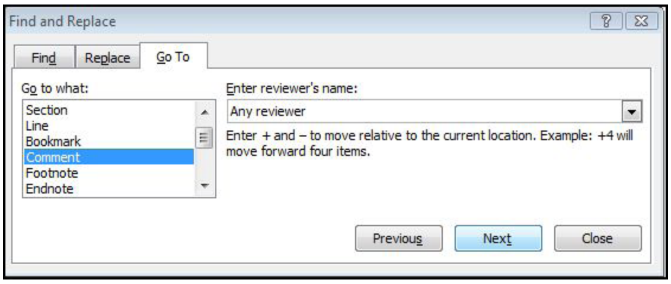
4. When you have finished reading the comments, choose from the final showing markup drop down box and select final all comments will be hidden.
   Don't forget that the next time you review the changes you will have to put these settings as they were otherwise you will see no markup or comments except for the last person it was set for.

Finding Comments

Comments, like footnote marks, can be found using the GoTo key:

▸ To find comments:

Keyboard

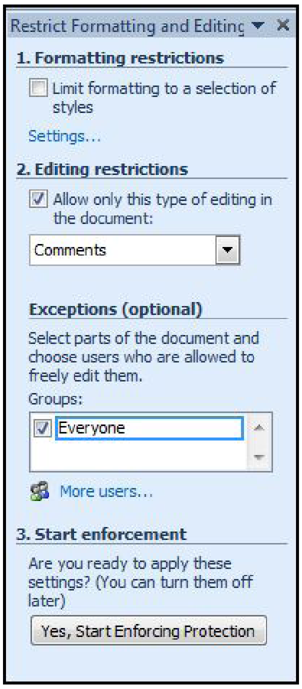


1. Ensure **FINAL SHOWING MARKUP** is turned on from the **TRACKING** group

2. Press **F5**
3. Select **COMMENT** in the **GO TO WHAT**: list
4. Choose either **ANY REVIEWER** or a specific reviewer from the **ENTER REVIEWER'S NAME** drop-down list
5. Click on **NEXT** to find the next comment, or **PREVIOUS** to search back through the document
6. Click on **CLOSE** to return to the document

Protect Document Allow only comments

You can a lock a document so that other users can only view and print, and add comments to it. The original author would still be able to edit the document.



› To lock a document:

Mouse

1. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
2. In the **EDITING RESTRICTIONS** area of the task pane, select **COMMENTS**
3. If many people have made comments you can select exceptions from the exceptions section to allow those users to freely edit them.
4. Click on **YES, START ENFORCING PROTECTION**
5. Enter a password in the dialog box that appears if you wish. Click **OK**

‣ To unlock a protected document:

Mouse

1. Choose **PROTECT DOCUMENT** from the **PROTECT** group on the **REVIEW** ribbon. And select **RESTRICT FORMATTING AND EDITING** from the menu.
2. At the bottom of the task pane click on the **STOP PROTECTION** button
3. You will be prompted to enter the password if one was originally added.
   Encryption to protect against malicious users needs windows rights management and a Digital signature

Printing Comments

You can choose to print the comments that have been added to a document without the document text itself.

Before you print the document, switch to Print Layout view and display the tracked changes and comments the way that you want them to appear in the printed document. You have several options.

Print showing all markup

1. On the **REVIEW** ribbon, in the **TRACKING** group, click **SHOW MARKUP**.

- *Clicking **SHOW MARKUP** displays or hides all markup in the document for selected reviewers. When you display all markup, all types of markup are selected on the **SHOW MARKUP** menu.*

Print showing changes and comments by type or reviewer

1. On the **REVIEW** ribbon, in the **TRACKING** group, click **SHOW MARKUP**, and then select the type of change that you want to display.

Print changes and comments for an editor or other reviewer

1. On the **REVIEW** ribbon, in the **TRACKING** group, in the **DISPLAY FOR REVIEW** box, click **FINAL SHOWING MARKUP**.
2. When the markup appears the way that you want it to, you are ready to print the document.

To print showing ONLY selected markup

1. Click the **FILE TAB** , and then click **PRINT**.
2. In the Print options area, in the **SETTINGS** box, click **PRINT MARKUP**, and then if all other settings are what you want them to be click **PRINT**
   By default, Microsoft Word chooses the zoom level and page orientation to best display the tracked changes in your printed document.

Balloons

If balloons are turned on, the document will shrink to fit the balloons on the printed page. To make your printed page readable,

To turn off balloons

Mouse

1. Click **BALLOONS** in the **TRACKING** group
2. Click **SHOW ALL REVISIONS INLINE.**
3. You can also set the page layout to landscape to print the balloons and the text in a more readable format.
4. Go to the **PAGE LAYOUT** ribbon, under **PAGE SETUP**,

click **ORIENTATION**, and then click **LANDSCAPE**.

Versions

Enabling recovery

Enable Recover Enable Recover unsaved versions

Mouse

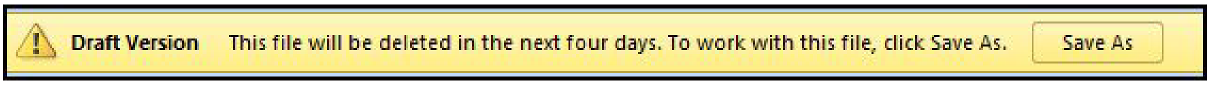
1. Click the **FILE** tab.

2. Click **OPTIONS**.
3. Click **SAVE**.
4. Select the **KEEP THE LAST AUTOSAVED VERSION IF I CLOSE WITHOUT SAVING** check box.

- *This feature only applies to Word 2010, Excel 2010 and PowerPoint 2010.*
- *You must have AutoRecover enabled to use this feature.*

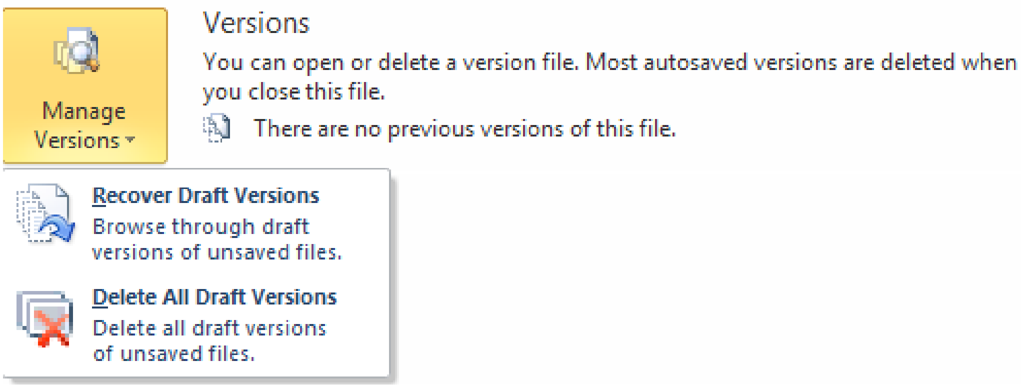
5. Click the **FILE** tab.

6. Click **RECENT**.
7. Click **RECOVER UNSAVED DOCUMENTS** near the bottom of the screen.
8. Your saved drafts folder will open in a new window. Select the file and then click **OPEN**.
9. In the business bar at the top of the file, click **SAVE AS** to save your file to your computer.



<u>OR</u>

1. Open a new file or any existing file.
2. Click the **FILE** tab.
3. Click **INFO**.
4. Click **MANAGE VERSIONS.**



5. Click **RECOVER UNSAVED DOCUMENTS**
6. You will see the list of your unsaved files. Select the file and click **OPEN**.
7. In the business bar at the top of the file, click **SAVE AS** to save your file to your computer

Previously saved files

If you are working in a file that has been saved previously, and close it without saving your current edits, follow these steps.

› To open the last autosaved draft:

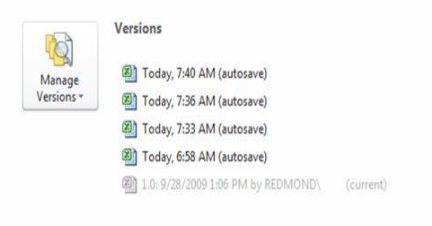
Mouse

1. Open the file that you were working with.
2. Click the **FILE** tab.
3. Click **INFO**.
4. Under **VERSIONS**, click the version labelled **(WHEN I CLOSED WITHOUT SAVING)**.
5. In the business bar at the top of the file, click **RESTORE** to overwrite any previously saved versions with the last autosaved version of your file.

Working with autosaved versions of your file

› To view autosaved versions of your current file, follow these steps:

Mouse



1. Click the File tab.
2. Click Info. The autosaved versions of your current file are listed under Versions.
3. Click on any version in the list to open it.

› To Compare an earlier version of your file with the current version

Word 2010 lets you compare your current document with an earlier one, and choose which changes you want to save. To compare your current Word document with an earlier autosaved version, follow these steps:

1. Click the **FILE** tab.
2. In the version list, click on the earlier version you want to compare with your current document.
3. In the business bar at the top of the document, click **COMPARE**.

Section 9 Objects

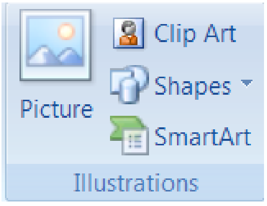
By the end of this section you will be able to:

- Insert pictures and drawing objects from the insert ribbon
- Use the design and format ribbons to enhance your objects
- Insert new 2010 objects such as SmartArt

Inserting, formatting and deleting objects

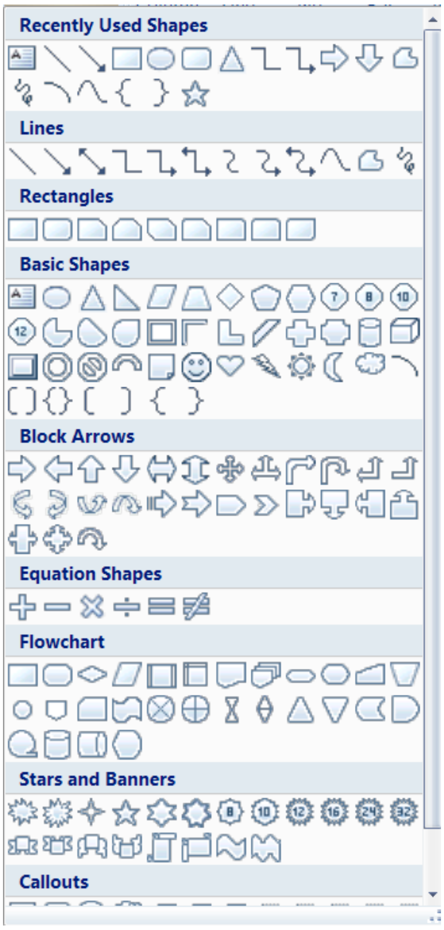
Inserting A Drawing Object

Inserting pictures, text boxes, callouts, scanned images etc into a document can greatly enhance your overall document appearance. The subject of dealing with these objects will be looked at more thoroughly in PowerPoint as that application deals primarily with inserted objects and how to deal with them as word works primarily with text and excel with figures, however here is a brief rundown of some items you may insert and how to deal with them.



› To insert a shape onto document.

Mouse



1. On the **INSERT** ribbon in the **ILLUSTRATIONS** group, click on the drop down arrow to the right of **SHAPES.**
2. Make a selection by clicking with the left mouse button on the desired shape. If you cannot immediately find what you want, scroll down using the scroll bar to the right to locate other shapes.
3. The menu will dissappear but your mouse cursor will appear as a small black cross. Click and drag diagaonally to place the shape on the document.

To move or resize a shape

Mouse

1. Select shape by clicking on it selection will be shown by handles appearing around the shape.
2. Moving mouse cursor over shape should give a four pointed arrow clicking and dragging with this cursor will move the shape to desired position.

OR

1. Use cursor keys for small adjustments in moving shape around document.
2. Moving mouse cursor over a handle will give a black two pointed arrow. Clicking and dragging will resize the shape to appropriate size.

To delete a shape

Mouse

1. Select shape by clicking on it selection will be shown by handles appearing around the shape.
2. Press **DELETE** on the keyboard to remove shape.

SmartArt

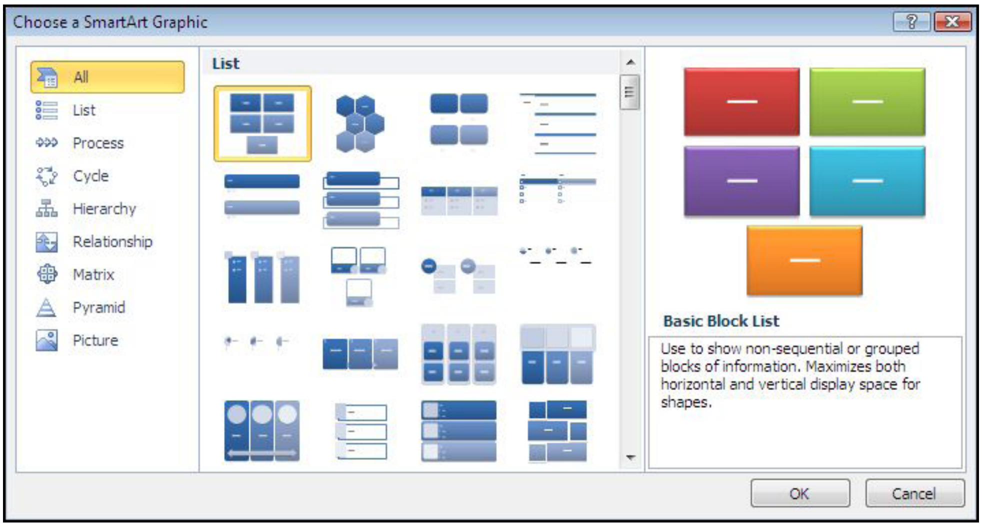
A SmartArt graphic is a visual representation of your information and ideas. You can create SmartArt graphics by choosing from among many different layouts to quickly, easily and effectively communicate your message.

Most people create content that contains only text, even though illustrations and graphics help audiences understand and recall information better than text. Creating designer-quality illustrations can be challenging, especially if you are not a professional designer or you cannot afford to hire a professional designer. If you use earlier versions of Microsoft Office, you can spend a lot of time making shapes the same size and aligning them properly, getting your text to look right, and manually formatting the shapes to match the document's overall style, instead of focusing on your content. With SmartArt graphics and other new features such as themes, you can create designer-quality illustrations with only a few clicks of your mouse.

When you create a SmartArt graphic, you are prompted to choose a type such as **PROCESS, HIERARCHY, CYCLE,** or **RELATIONSHIP**. A type is similar to a category of SmartArt graphic, and each type contains several different layouts.

When you choose a layout for your SmartArt graphic, ask yourself what you want to convey and whether you want your information to appear a certain way. Because you can quickly and easily switch layouts, try different layouts (across types) until you find the one that best illustrates your message. Experiment with different types and layouts by using the table below as a starting point.

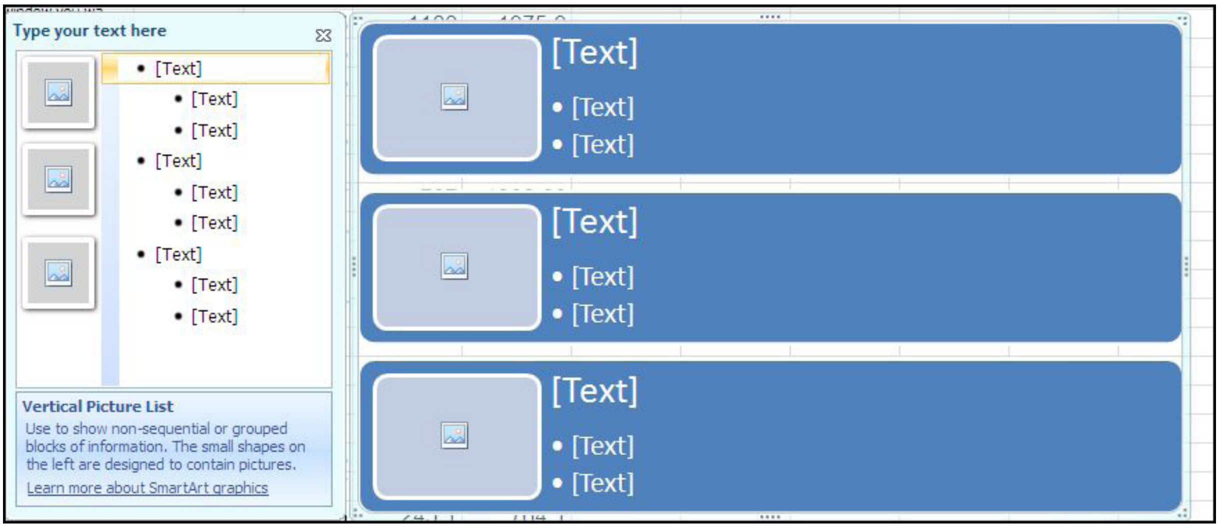
When you switch layouts, most of your text and other content, colours, styles, effects, and text formatting are automatically carried over to the new layout.



To insert a SmartArt graphic

Mouse

1. On the **INSERT** ribbon in the **ILLUSTRATIONS** group, click on the drop down arrow to the right of **SMARTART** the **SMARTART** dialog above will appear
2. Choose a category from the left then a graphic from the centre to see a preview on the right.
3. When you have the selection you desire click ok to insert the smartart on your worksheet
4. The smart art will appear in your document as in picture below.



About the Text pane

The Text pane is the pane that you can use to enter and edit the text that appears in your SmartArt graphic. The Text pane appears to the left of your SmartArt graphic. As you add and edit your content in the Text pane, your SmartArt graphic is automatically updated— shapes are added or removed as needed.

When you create a SmartArt graphic, the SmartArt graphic and its Text pane are populated with placeholder text that you can replace with your information. At the top of the Text pane, you can edit the text that will appear in your SmartArt graphic. At the bottom of the Text pane, you can view additional information about the SmartArt graphic.

To enter text into SmartArt

Mouse

1. Click on placeholder in the **TEXT PANE.**
2. Placeholder text will disappear.
3. Type required text and press **ENTER**
4. Focus will create a new placeholder and new shape waiting for text
5. Press **TAB** to move the text lower in the hierarchy in the example above or **SHIFT + TAB** to move it higher.

To remove a SmartArt shape

Mouse

1. Select the text or placeholder text of the shape you wish to remove in the **TEXT PANE**.
2. Press **DELETE** key on keyboard
3. Both text and shape will be removed from worksheet.

SmartArt Formatting

As you create a piece of smart art and click on the object you will see two contextual menus appear one for design and one for format.

Both ribbons appear below we will quickly look at some of the option to allow you to format your SmartArt object

QuickStyles

Quick Styles are combinations of different formatting options and are displayed in a thumbnail in the various Quick Style galleries. When you place your pointer over a Quick Style thumbnail, you can see how the Quick Style affects your SmartArt graphic or shape.

Quick Styles for SmartArt graphics (SmartArt Styles) include edges, shadows, line styles, gradients and three-dimensional (3-D) perspectives. Try different combinations of SmartArt Styles and colours until you find one that matches the message that you want to communicate. You can pick a layout, a SmartArt Style, and a colour variation that you like, and then change the layout again—your SmartArt Style and colours will stay with your SmartArt graphic, so that you do not need to re-do them.

SmartArt Styles map the theme effects (theme effects: A set of visual attributes that is applied to elements in a file. Theme effects, theme colours and theme fonts compose a theme.) of the document theme to the shapes within the SmartArt graphic. For example, shapes might have thick lines or edges, while arrows might have a more subtle style applied to them. You can also apply colours from the theme colours of the document in different ways, such as changing the colour of the shape border. If you create multiple SmartArt graphics and want them to look alike, you can apply the same colours and SmartArt Style to achieve a consistent, professional look.

You can have shapes that display with edges, depth, and rotate in 3-D space. To make a SmartArt graphic three-dimensional, apply a 3-D SmartArt Style or manually apply a 3-D rotation to each shape. If the entire SmartArt graphic is three-dimensional (called scene coherent 3D), you can continue to edit the text and formatting of each of the individual shapes, but the shapes cannot be repositioned or resized. You can only reposition or resize shapes in a two-dimensional scene.

2D And 3D

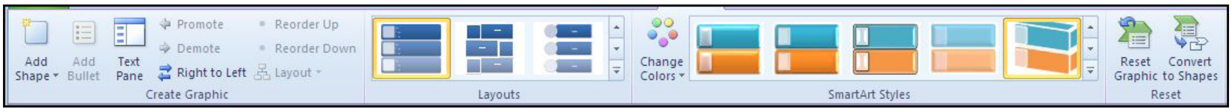
- <u>To switch between 2-D and 3-D,</u>

<u>Mouse</u>

1. Under **SMARTART TOOLS**, on the **FORMAT** ribbon, in the **SHAPES** group,
2. Click **EDIT IN 2-D**.

The **EDIT IN 2-D** button temporarily unlocks your SmartArt graphic for editing so that you can move and resize shapes—but the 3-D SmartArt Style is still applied to your SmartArt graphic and reappears when you click the **EDIT IN 2-D** button again. When your SmartArt graphic is displayed in a 3-D scene, you can rotate it as a whole and position light sources and the "camera" such that the entire SmartArt graphic appears to pop out of the screen.

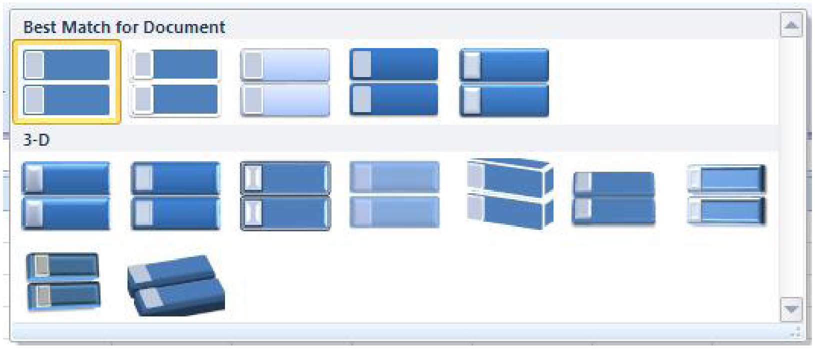
SmartArt Styles affect an entire SmartArt graphic, while Quick Styles for Shapes (Shape Styles) affect only the selected shape. You can manually customize a shape by changing the colour, effects or border, or by replacing it with another shape. It is recommended that you customize your SmartArt graphic only after you settle on its content and layout, as some customizations are not transferred because they might not look good in the new layout.



The Design Ribbon

The design ribbon contains a number of preset formats and design layouts for your SmartArt graphic you may use these either before or after you enter information into your SmartArt.

To change SmartArt style



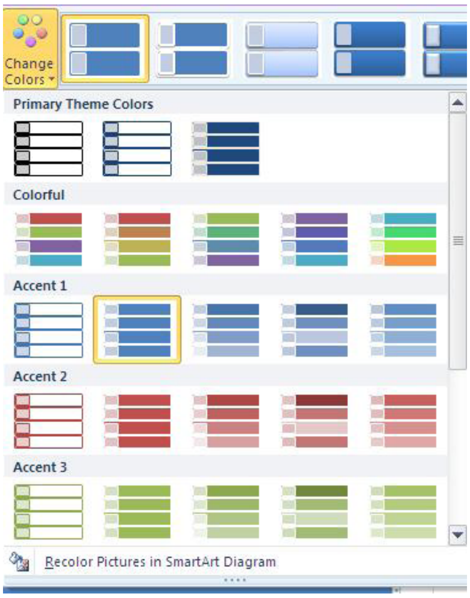
Mouse

1. Select your SmartArt graphic to enable the design ribbon
2. Go to the **SMARTART STYLES** group and click on the down arrow to the right of it
3. Move your mouse over the different styles to see a preview of the style applied to your SmartArt.
4. When you have the style that best suits your needs click on it to apply it.
5. You may do this many times if you change your mind

To change colour scheme

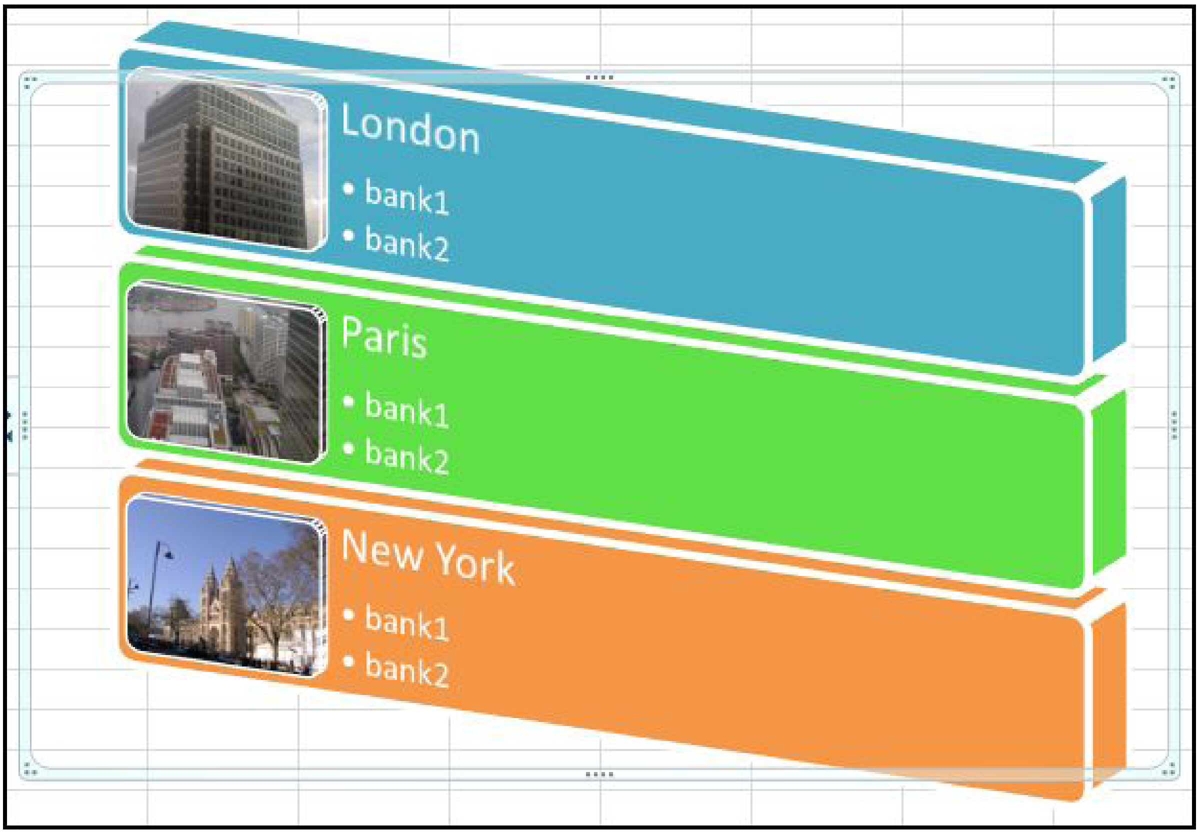
Mouse

1. Select your SmartArt graphic to enable the design ribbon



2. Click on the drop down arrow on the **CHANGE COLOURS** button
3. Move your mouse over the different colour schemes to see a preview of the colour schemes applied to your SmartArt.
4. When you have the colour schemes that best suit your needs click on it to apply it.
5. You may do this many times if you change your mind
6. To make small or large changes in the appearance of your SmartArt if you cannot find what you wish in the styles and colour schemes then you will have to go to the format ribbon and make the changes manually.

All drawing objects have similar options when it comes to formatting and we will look at the formatting shapes section.


London
bank1
bank2
Paris
bank1
bank2
New York
bank1
bank2

WordArt

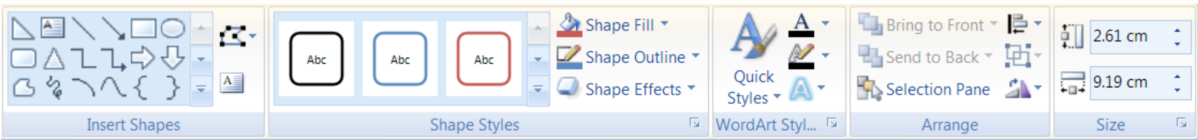
WordArt is a gallery of text styles that you can add to your 2010 Microsoft Office system documents to create decorative effects, such as shadowed or mirrored (reflected) text. You can change WordArt text, as you can change any other text in a shape.

Mouse

1. On the **INSERT** ribbon, in the **TEXT** group, click **WORDART**, and then click the WordArt style that you want.
2. Enter your text.
3. A WordArt graphic can be resized, rotated, deleted and moved like any other shape.

Formatting Shapes

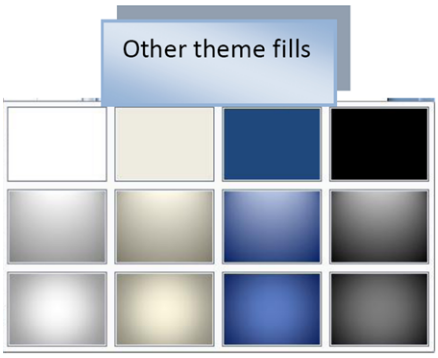
Any shape inserted on the spreadsheet, when selected, causes a new ribbon to appear called the **FORMAT** ribbon seen below, it offers the options of inserting further shapes. Formatting all aspects of the selected shape and fixing a specific size. The easiest method of formatting your shape is to use the QuickStyle option in the **SHAPE STYLES** group



To apply a QuickStyle

Mouse

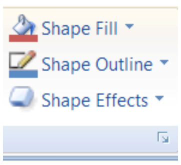
1. Select the shape or shapes you wish to apply a QuickStyle to.
2. As you move your mouse over the various options your shape on the worksheet will temporarily take on that format as a preview. See below.



3. If you prefer to look at the other them fills option at the bottom you will be given the above options
4. When you locate the style you want click on it to apply it to your shape.

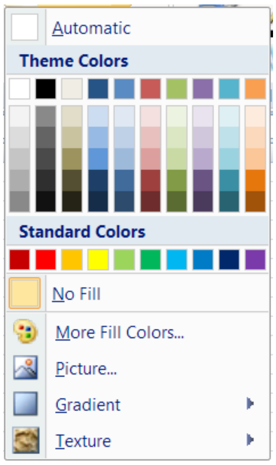
Manual Formatting

Manual formatting can be applied as well. Fill, border, 3D, rotation etc using various tools from the format ribbon. There are also tools for aligning, layering and sizing your shape as in a desktop publishing programme.



To change fill colour

Mouse

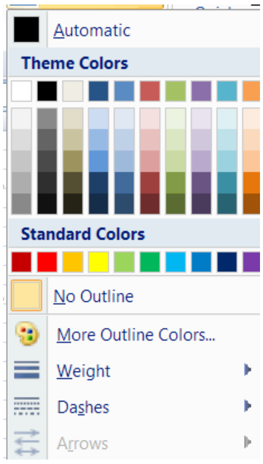


1. Select shape to be formatted select **FILL COLOUR** from the **SHAPE STYLES** group.
2. Select a **THEME COLOUR, STANDARD COLOUR, GRADIENT, TEXTURE, PICTURE** or **MORE FILL COLOURS**.

   more fill colours gives a palette with any possible colour you may require. You may match a colour if you know the RGB *or* CYMK *numbers)*

To change a border

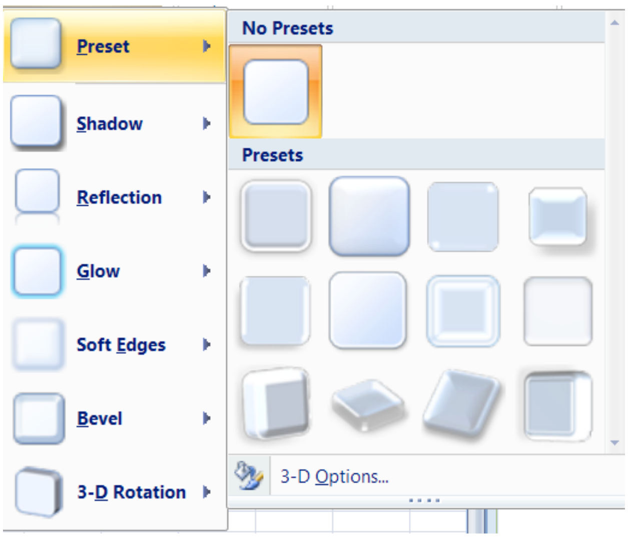
Mouse



1. Select shape to be formatted select **SHAPE OUTLINE** from the shape styles group.
2. Select a **THEME COLOUR, STANDARD COLOUR** or **MORE OUTLINE COLOURS.**
3. when you have selected a colour for your shapes outline you may wish to make it thicker or to have a dashed style. Repeat step one and select weight or dashes and make a selection to apply to your shape. ***The arrows option is available if your shape happens to be any kind of line you may choose an arrow style as well as a weight and line style***

To apply shape effects

Mouse



1. Select shape to be formatted. Click on shape effects to see menu on right

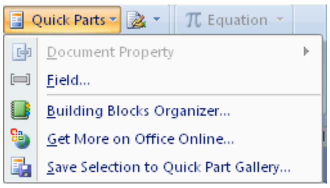
2. The preset menu shows popular styles made up of the other menu choices. Select a preset to apply.
3. You may alter aspects of the preset by repeating and selecting a different menu choice.
   Using all formatting choices shown gives a very professional finish to any object placed on the worksheet many of these options are available for charts and pictures.

Building blocks

Building blocks are items within a document that you save using the Quick Parts tool to be reused in other documents. **AUTOTEXT** was used previously in earlier versions of word. in 2007 **BUILDING BLOCKS** or **QUICK PARTS** was introduced and that has now been enhanced but it works the same way it allows the storage of pictures, tables or anything.

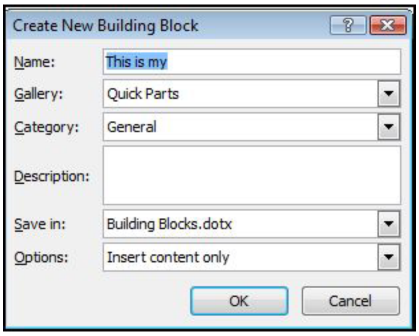
- ***E.G***. *you might save your company's contact information or mission statement, a design for a report opening, a special list style that you use in your documents regularly, or a staff roster you include on finished publications.*

Creating A Quick Part

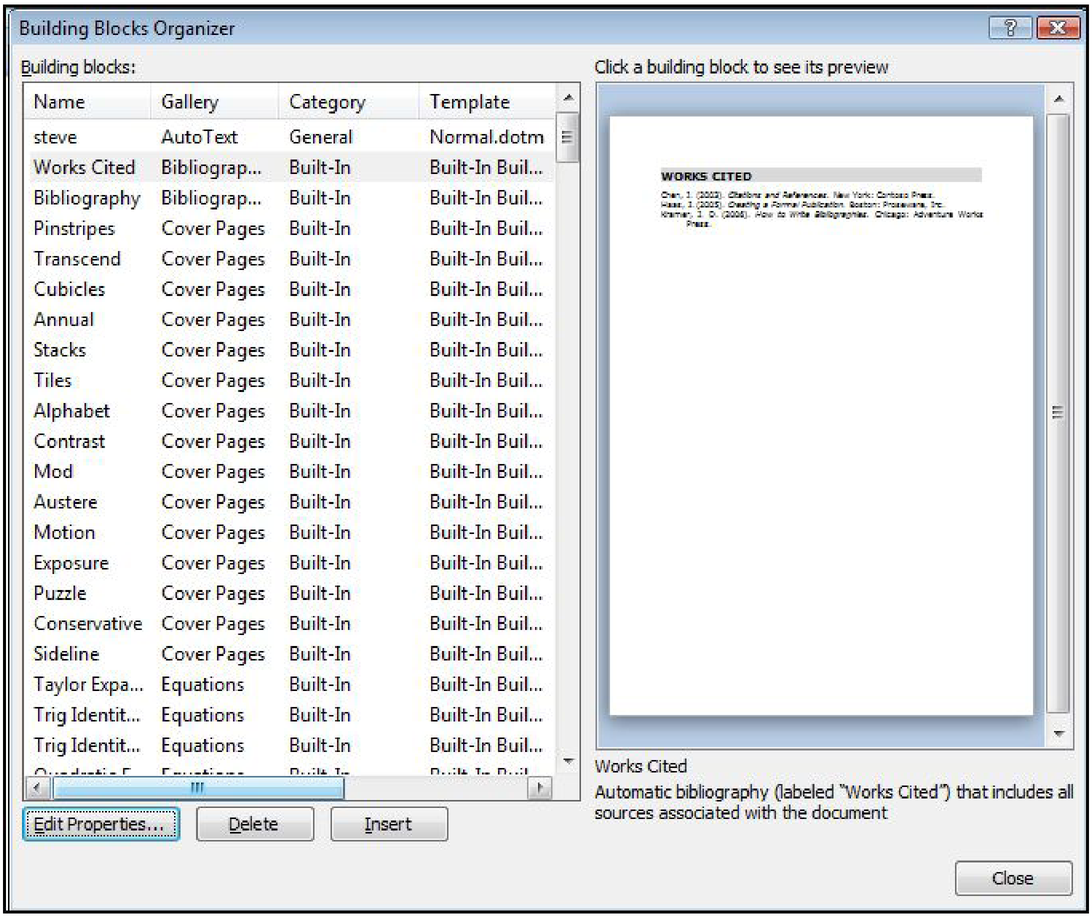


1. Select the content you want to save as a building block.
   The content you select can include text, images, and special formats. Whatever you save as a building block will be placed in the new document as is, so lines, logos, hyperlinks, and more can be saved for reuse.

2. Click the **INSERT** ribbon and in the **TEXT** command group, click the down arrow next to **QUICK PARTS**. A menu appears.



3. Click **SAVE SELECTION TO QUICK PART GALLERY**. The **CREATE NEW BUILDING BLOCK** dialog box appears.
4. Type a name for the **QUICK PART** and click **OK**. This saves the new item in the **QUICK PARTS** gallery so that you can insert it in a document by selecting it from the **QUICK PARTS** menu or the **BUILDING BLOCKS ORGANISER**



Adding Quick Parts To A Document

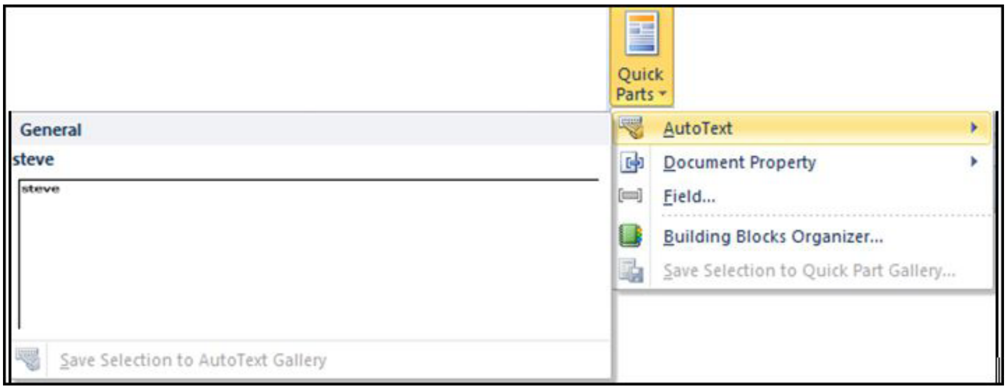
Once you have stored often used text blocks, pictures and tables to your quick parts also stored in the building blocks gallery all you need to do is insert them in the appropriate places.

> ***If you want to see the whole collection of available building blocks, including the ones you added, click*** *BUILDING BLOCKS ORGANISER* ***in the*** *QUICK PARTS* ***menu. A large variety of building blocks are provided for everything from cover pages to equations to page numbering. In the*** *BUILDING BLOCKS ORGANISER,* ***you can preview, edit, or delete building blocks and, if you choose, insert them in your current document.***

To add a quick part

Mouse

1. Open the document in which you want to add the Quick Part.
2. Click to insert the cursor at the point in the document where you want to add the item.
3. Click the arrow next to **QUICK PARTS**. In addition to the options previously available, now you see a list of building blocks you have added to the list.
4. Click the part you want to insert at the cursor position.

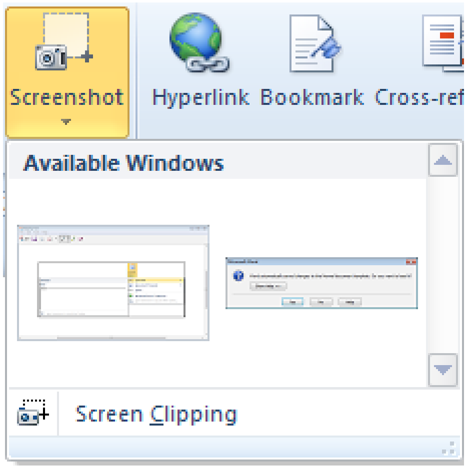


Screenshot

This feature is new to office 2010 it allows a quick method of inserting snapshots of open windows or to allow you to take a snip of a section of the screen

‣ To insert a screenshot

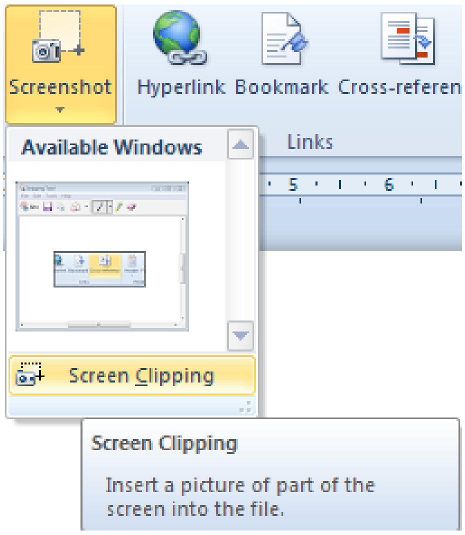
Mouse



1. While in word make sure you have more than just word window open and that the window is open that you want to have a snapshot of .
2. While in word go to the **INSERT** menu and the **ILLUSTRATIONS** group and click on the down arrow of the **SCREENSHOT** button.
3. Make a selection of which window you want to insert and click on it in the menu.
4. The window shot will appear in your document
5. Resize or crop to suit your needs

To insert a screen clip

Mouse



1. Click on the window you want to take a screen snip of
2. Click on the word window next
3. While in word go to the **INSERT** menu and the **ILLUSTRATIONS** group and click on the down arrow of the **SCREENSHOT** button.
4. Move your mouse down to the bottom of the menu and click on screen clipping
5. Word will minimise and allow you to click and drag to select whatever part of the screen you wish.
6. When you release the mouse The screen clip will appear in your document
7. Resize or crop to suit your needs

Section 10 Advanced extras

<u>By the end of this section you will be able to:</u>

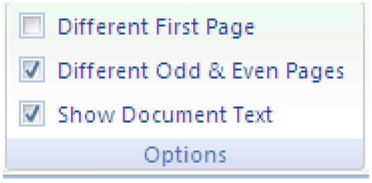
- Set up odd and even Headers and Footers
- Set the start number for page numbers in a document
- Create hyperlinks in a document
- Understand and use Auto format options
- AutoComplete text in documents
- Add buttons and menus to the Quick Access tool bar to carry out Word commands
- Customise the ribbon
- Understand what a macro is.
- Record macros to carry out sequences of commands
- Assign macros to shortcut keys, toolbar buttons and The ribbon

Odd & Even Headers & Footers

Headers and footers appear at the top and bottom of each page within a document. The header that you add will be the same on every page as will the footer. You can suppress the header or footer from the first page of a document

- *(E.G. if you have a title page where you don't want them to appear). If your document is being printed in book format you may want to set up a header for the odd pages and a mirror image header for the even pages and likewise for the footer.*

This feature is typically used to set-up headers and footers for a double-sided document, providing you with the ability to have a different header/footer on the left page (even) to that on the right page (odd).



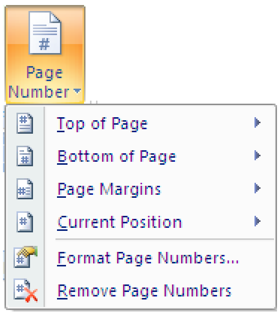
- *E.G. the page number is printed at the bottom left of an even page and the bottom right of an odd page.*

To create a different odd and even page header/footer:

Mouse

1. Edit the current header or footer.
2. Click on the **DIFFERENT ODD AND EVEN PAGES** check box in the **OPTIONS** group on the **DESIGN** ribbon.
3. The current header and footer now becomes the Odd Page header/footer. The Even Page header and footer will initially be blank. You can input text, page numbers etc. in the usual way.
   For information on how to create different headers and footers in different parts of the same document, see the chapter on Sections earlier in this manual.

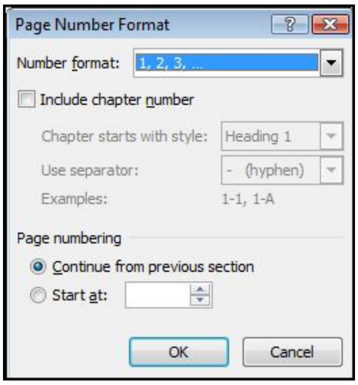
Resetting Page Numbers



Unless you specify otherwise, page numbers always start counting from 1. If you have a title page in your document, you may want to actually start the page numbering on the second page. Section breaks may well cause many problems for the unwary ensure you read the section on section breaks before attempting to deal with these page number techniques.

To set the start number for numbered pages:

Mouse



1. First of all you will need to remove the page number from the first page by creating a different first page header and footer by clicking on the **DIFFERENT FIRST PAGE** check box in the **OPTIONS** group on the **DESIGN** ribbon..

2. Choose **FORMAT PAGE NUMBERS** from the **PAGE NUMBER** button in the **HEADER & FOOTER** group on the **DESIGN** ribbon. In the Start at: field, enter 0 (zero) Click on **OK**, and then choose **CLOSE**
3. You can then use the **SHOW NEXT/SHOW PREVIOUS BUTTON** on the Headers and Footers toolbar to show the new page numbering
4. The overall effect is that the first page displays no numbering, and the second page displays "Page 1".

Hyperlinks

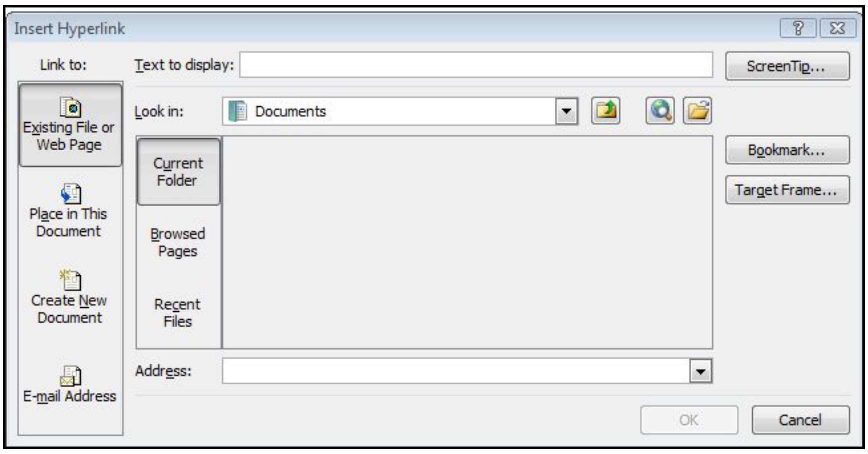
A Hyperlink creates a shortcut from one location to another location whether it is in Excel, Word, and PowerPoint or within the same file.

Word '2010 has a **HYPERLINK** button on the **INSERT** ribbon in the **LINKS** group that you can click to create the link.

To create a hyperlink:

Mouse

1. Position the mouse in the text where you want to create the Hyperlink
2. Click on the **HYPERLINK** button on the **INSERT** ribbon in the **LINKS** group a dialog will open.



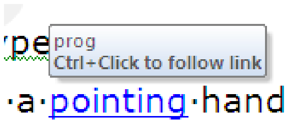
3. In the **TEXT TO DISPLAY BOX** enter text that you wish to see in your document as your link
4. In the **LINK TO** box make a selection of where you wish to link to (the picture above is set to a file or web page.)
5. In the **LOOK IN** box you can browse to locate your file if it is local
6. Use the **ADDRESS BOX** if it is a web page enter the complete web page address
7. Use the **BOOKMARK** button if linking to a bookmark within the current document

8. Enter a **SCREENTIP** if you wish it is merely a help feature. If somebody hovers their mouse over the link it appears to so as to give them information about that link.
9. When all options have been set click on **OK** to insert your hyperlink

- *You can also use the Hyperlink to take you to a certain location within a document, such as a named range, sheet tab, bookmark or particular slide.*

To use the hyperlink:

Mouse



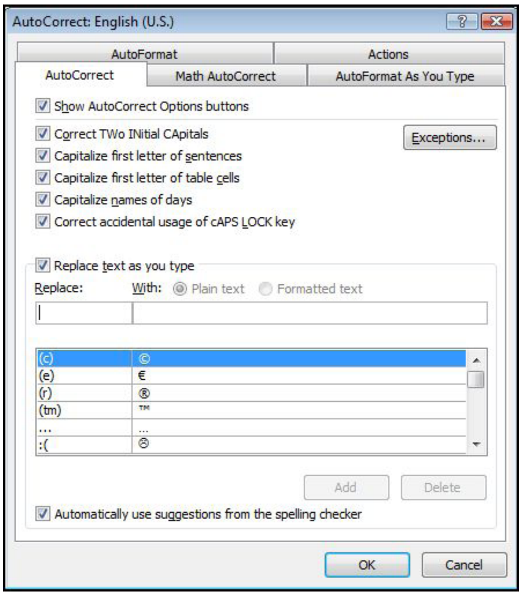
1. Position mouse pointer over the Hyperlink.
2. The mouse pointer will change into a pointing hand.
3. Hold down the **CTRL** key and Click the mouse button once and you will be transported to the specified location.

To delete hyperlink

Mouse

1. Right click on the link and from the menu choose remove hyperlink

Autoformat



Word can format text automatically as you type. This helps when creating numbered or bulleted lists, or entering fractions and ordinals and even borders.

Auto List Creation

If you begin typing your list using certain characters, Word automatically recognises what you want and formats subsequent paragraphs accordingly.

▸ To create a numbered list:

Mouse

1. Start a list with a number followed by either:

Character	Example
Full-stop	1.
Hyphen	1-
Closing bracket	1)
Greater than sign	1>

2. Type a **TAB** or a **SPACE** and then enter your text.
3. Press **ENTER**, the next line will be automatically numbered.

To create a bulleted list:

Mouse

1. Start the list with either of the shown characters, followed by a space:

Character	Example
Asterisk	*
Two hyphens	--
Greater than sign	>
Hyphen and greater than sign	->
Equal and greater than sign	=>

Using Autoformat Settings To Create Borders

By typing three of the following symbols, the following lines appear:

Three Hyphens	---
Three Equal signs	===
Three Tilde signs	~~~
Three Underscores	___
Three Asterisk signs	***
Three Hash signs	###

General Text Auto Formatting

Word's AutoFormat changes the following all automatically as you type options.

Fractions	1/4, 1/2 or 3/4	¼, ½ and ¾
Ordinal numbers	1st, 2nd, 3rd	1st , 2nd and 3rd
One hyphen immediately preceded and followed by text	Chapter 1 - Formatting	Chapter 1 – Formatting

- *You are able to have words formatted in bold and italics as you type:*
- By typing *New Zealand*, you will get ***New Zealand***
- By typing _New Zealand_, you will get *New Zealand*

Autocomplete

Word can automatically offer suggestions for the rest of the word or phrase you are typing. To accept the suggestion, you press **ENTER** and word will automatically replace your partially typed word with the complete word.

Examples of AutoComplete:

Current Date

Day of the Week

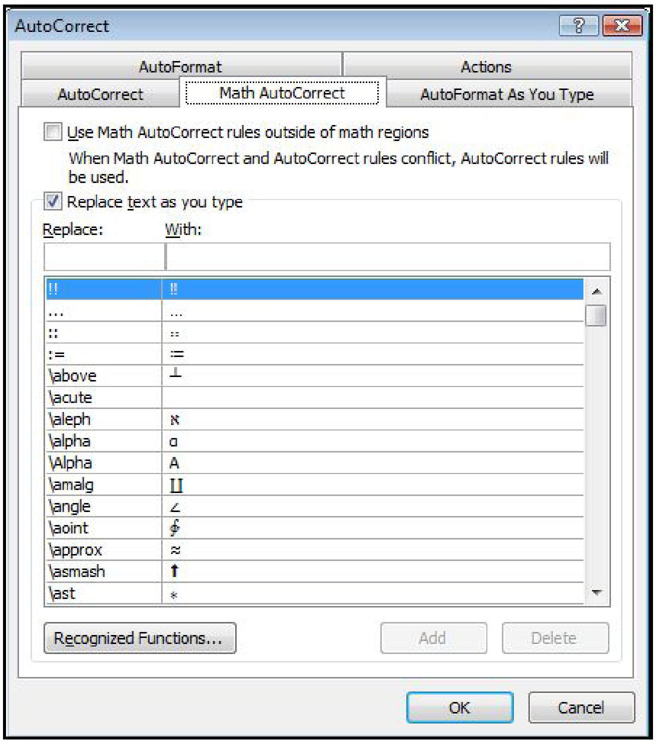
Month Names

*Your name and company name (as long as you have entered it into the User Information under **FILE** Tab, **OPTIONS**, **GENERAL**)*

AutoText entries

Autocorrect

There are now two autocorrect facilities in word the original **AUTOCORRECT** and the new **MATH AUTOCORRECT**

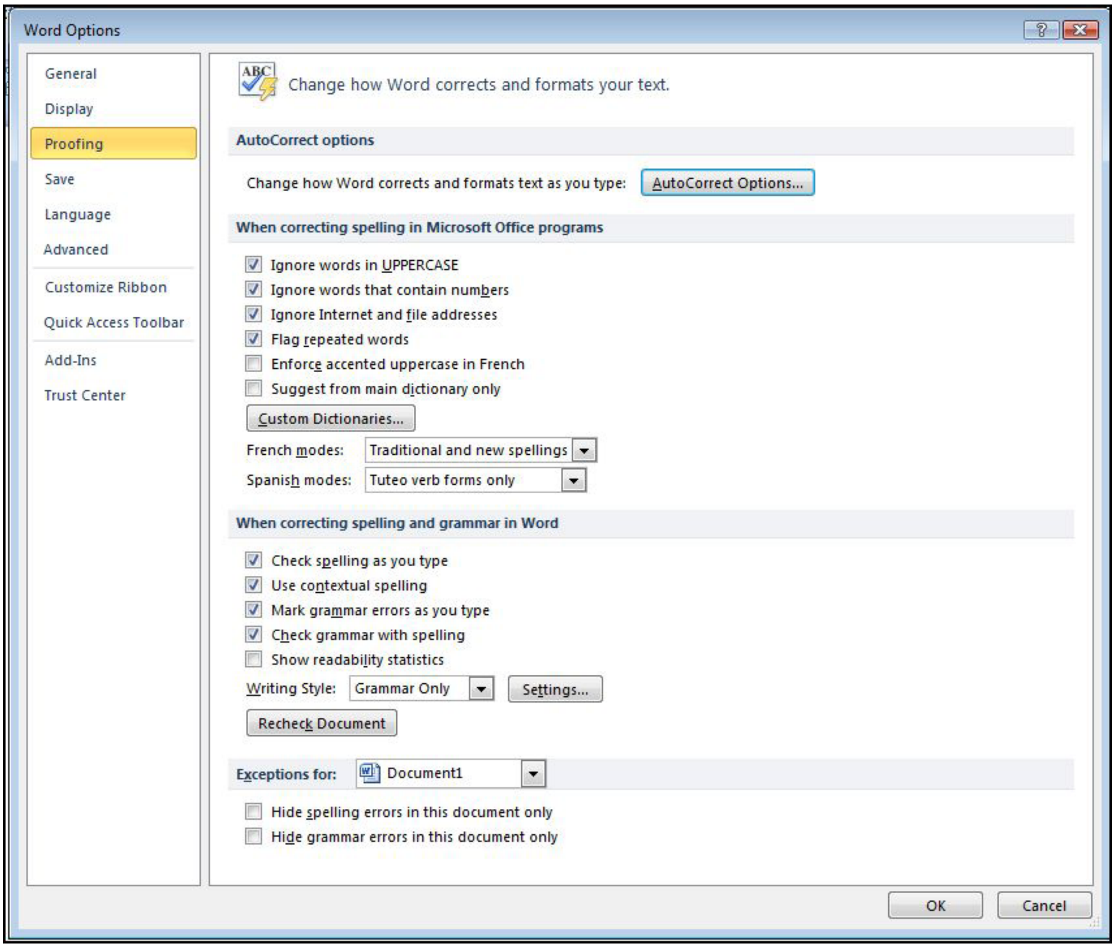


The whole idea of these autocorrect features is to allow you to quickly enter a special character with a few well remembered keystrokes or correct a mistyped word automatically. Typing for instance "\approx" and pressing the space bar will change the typed text and enter the mathematical symbol ≈. To ensure that these work in normal textual typing however, we must ensure that the Math autocorrect is turned on in the normal use of text by checking the tick box near the top of the autocorrect sheet.

▸ <u>To set autocorrect and Autoformat settings</u>

<u>Mouse</u>

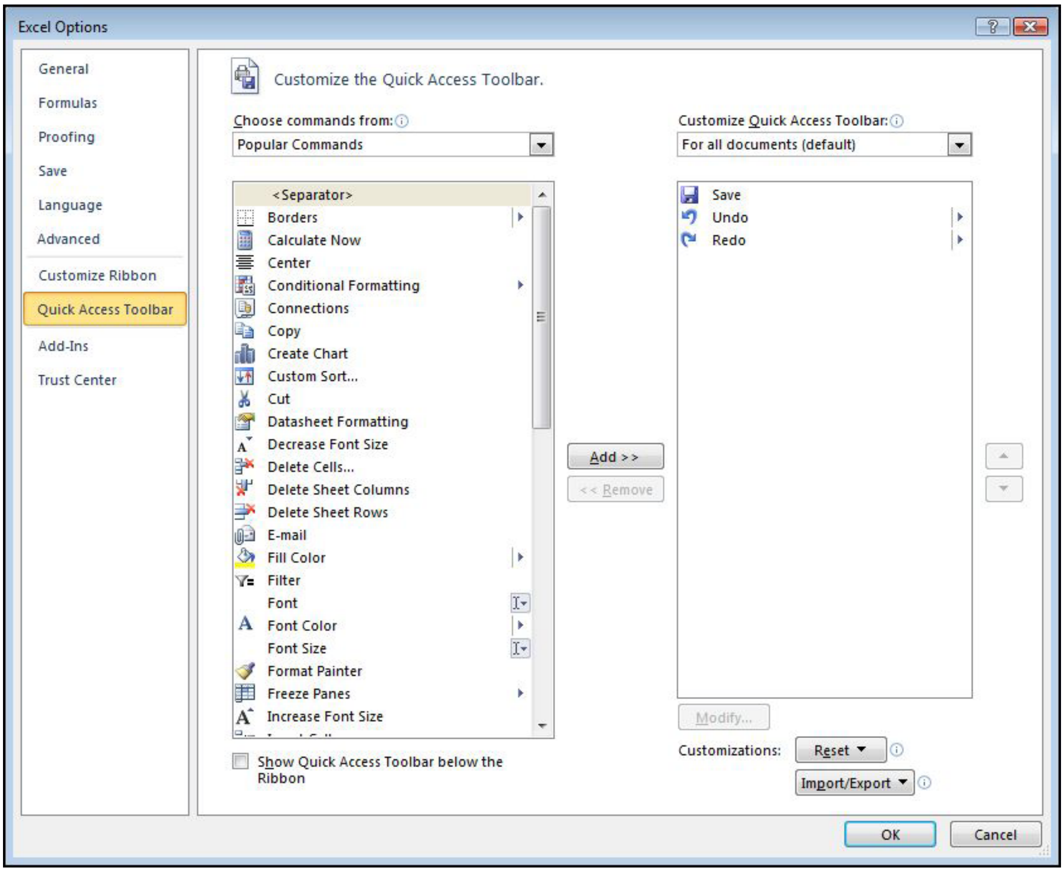
1. Click on the **FILE TAB** and select **OPTIONS** a dialog will appear.
2. Click on the **PROOFING** tab on the left and select the **AUTOCORRECT OPTIONS** button in the top of the right hand pane
3. The dialog box on the previous pages appears
4. Select the appropriate tab and change the settings you wish to change.



Customising command access

Customise Quick Access Toolbar

This is the location where you are able to customise the quick access toolbar (above the **FILE RIBBON**) and add your most often used buttons to it.



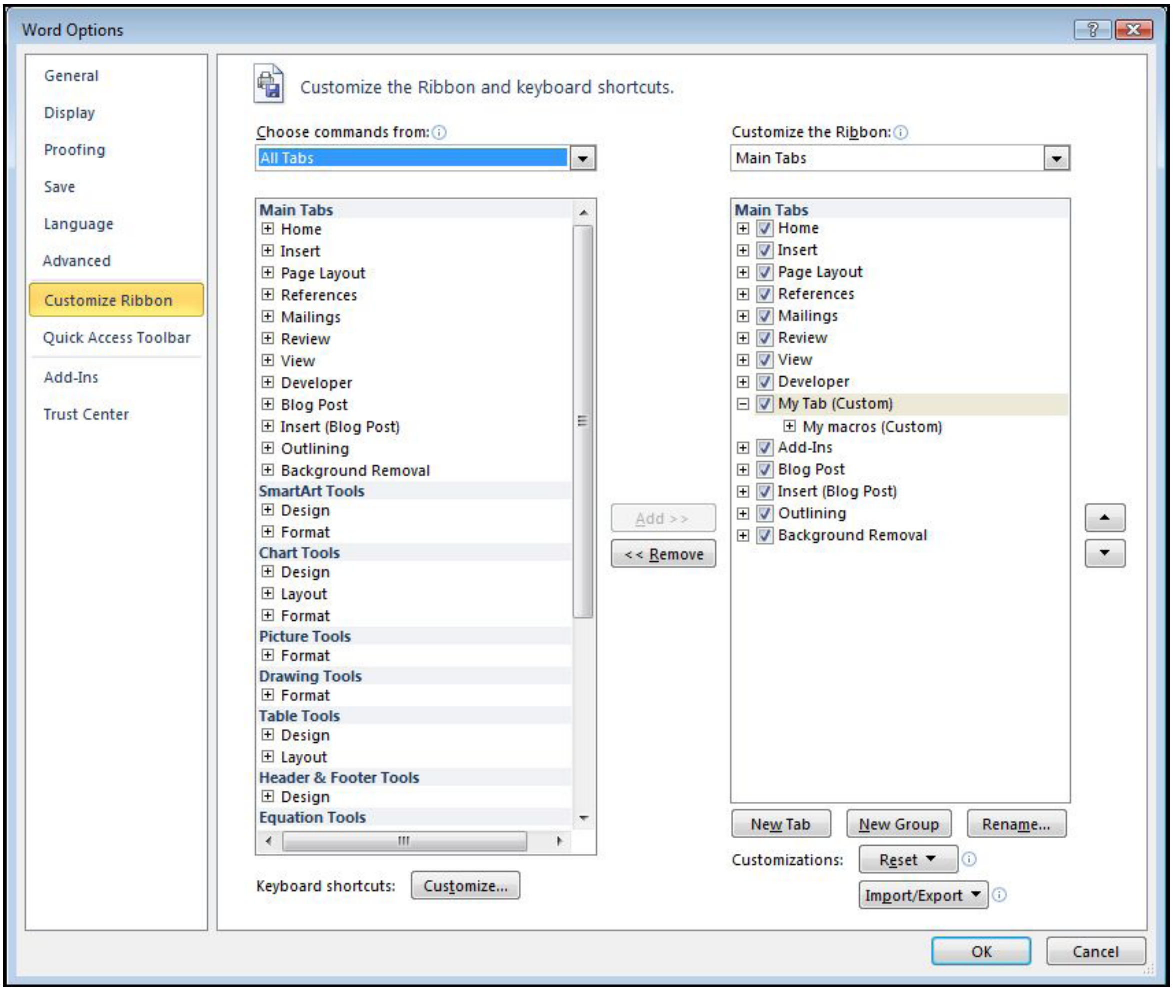
To customise quick access toolbar

Mouse

1. Open up the **OPTIONS** dialog from the **FILE** ribbon
2. Go to the **QUICK ACCESS TOOLBAR** button on the left
3. From the drop down arrow on the top left of the box you may choose which group of commands you may wish to see.
4. Select the buttons on the left and click on the add button in the middle to move them to the toolbar.
5. If you make a mistake then select the button on the right and click **REMOVE**.
6. Once all the buttons you want are on the right hand side click **OK** to finalise your choices and apply them.
7. You may click on **RESET** at any time to return to the default quick access toolbar

Customise Word Ribbon

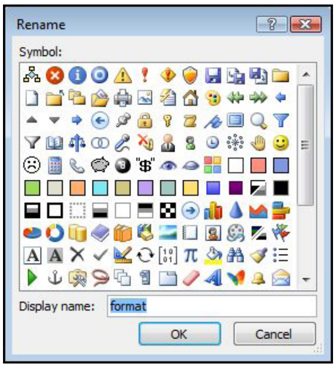
New to 2010 is the ability to customise existing ribbons and create new ribbons with all the most useful tools for the way you work with Word. These customisations can be exported and imported into other computers using Word 2010 or simply store the exports in case your machine has to reinstalled. Then simply import your customisations into the new installation.



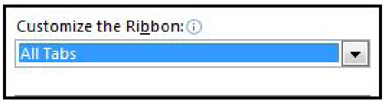
▸ To create a new ribbon

Mouse

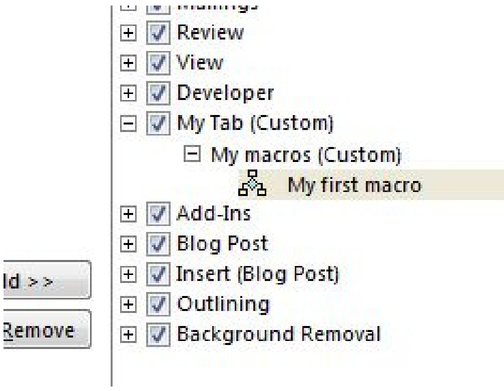
1. Go to the **FILE** ribbon and open the **OPTIONS** from the button on the below left.
2. Go to the **CUSTOMISE RIBBON** button the dialog box above will be seen.
3. Click on the **NEW TAB** button a new tab will appear in the right hand frame
4. Use the arrow buttons on the far right to position the tab where you wish it to appear.
5. Click on **RENAME**. Give your tab a name and press **OK**.



6. Select the **CUSTOM GROUP** on your created tab
7. Click **RENAME** Select an icon and name the group then click on **OK**
8. You may add several groups onto your tab if you wish, just rename each of them with appropriate labels.



9. Now you may drag the buttons you wish from the box on the left onto your group on the right.
10. If you cannot find a button you wish, go to the drop down box at the top of the commands and select the **ALL COMMANDS** option for example or **COMMANDS NOT IN THE RIBBONS**. You will now have other buttons you may wish to use
11. When all the buttons have been added that you wish You will end up with your own ribbon on the right with the commands you would most like to access easily.
12. When you click ok you will find your ribbon amongst the others selecting it you will be able to use the commands you have added.



13. You may use the same method to edit existing ribbons

› To show or hide a ribbon

Mouse

1. Access the options from the file ribbon
2. Go to the customise ribbon button
3. Tick or untick the tabs in the right hand box to show or hide ribbons from use.

Macros

Macros are sequences of commands that you can store under a given name and then playback in a variety of different ways. It is useful to set up macros when you find yourself manually issuing the same set of commands over and over again.

Word allows you to record the commands that a particular macro should play back which makes it very easy to set them up. Unless you specify otherwise, your macros are available at a global level – that is you will be able to use macros that you have set up in all the documents that you have created or go on to create.

Recorded Macros

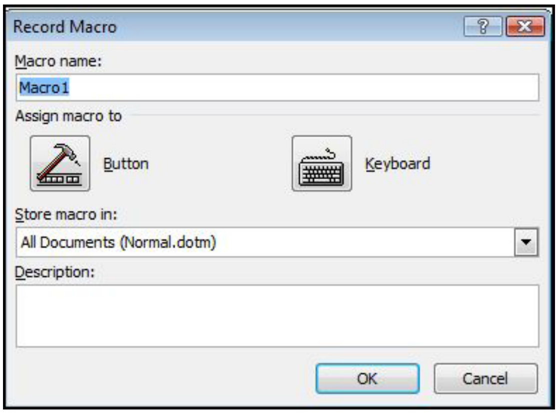
There are a few things that you need to know about what gets recorded as part of a macro. When you're recording a macro, you can use the mouse to click commands and options, but the macro recorder doesn't record mouse movements in a document window. E.G. you can't use the mouse to move the insertion point or to select, copy, or move items by clicking or dragging. You must use the keyboard to record these actions. When you're recording a macro, you can temporarily pause recording and then resume recording where you stopped.

Initially the macro features are hidden we must be able to see the developer ribbon to allow us to work with macro's

› **To show developer ribbon**

Mouse

1. Click on the **FILE TAB** and select **OPTIONS** a dialog will appear.
2. Go to the **CUSTOMISE RIBBON** button on the left and on the right tick the tick box next to the **DEVELOPER** ribbon.



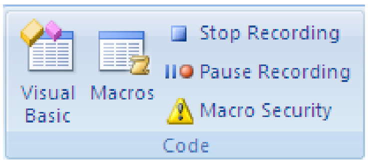
3. The **DEVELOPER** ribbon will appear.

To record a macro:

Mouse

1. Open the file you wish to store the macro in preferably a template.
2. Go to the developer ribbon and click on the record macro button in the code group. The following dialog box will appear:
3. In the **STORE MACRO IN** drop-down list, choose the name of the template where you want to save the macro. By default if no specific template is open it will be stored in the normal template.

4. In the **MACRO NAME** edit box, type in an appropriate name for the macro.



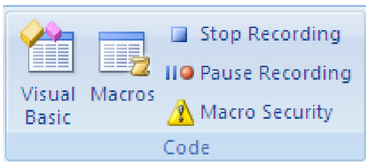
5. Click **OK**.

   Macro names can be up to 80 characters long and cannot include punctuation characters.

6. Carry out the sequence of commands that you want stored within your macro.
7. Click the **STOP RECORD** button in the **CODE** group when you have finished recording.
8. Save the template.

Don't worry if you make a mistake while recording your macro. Any cancel or Undo commands that you issue won't be saved as part of the finished macro. If you really mess up, simple record the macro again under exactly the same name – Word will ask you if you want to replace the existing copy with the new one, click *Yes* ***to overwrite.***

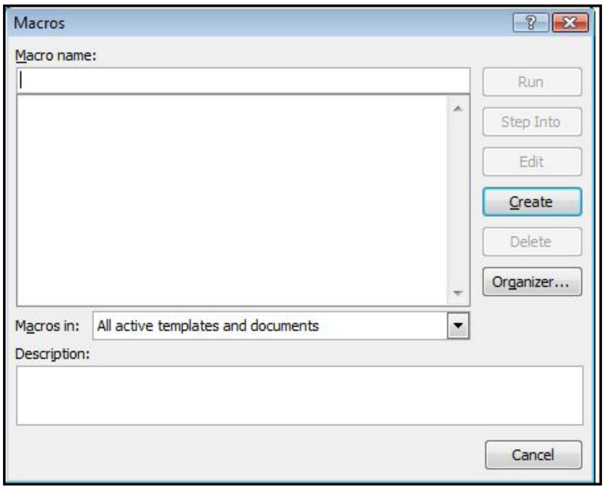
Playback A Macro



Once a macro has been created, any time you want to carry out the sequence of commands the macro has stored, you can play it back.

▸ To play a macro:

Mouse



1. Click the **MACROS** button in the **CODE** group.

Or

Keyboard

1. Press **ALT F8**. The following dialog will appear:-
2. Double-click on the name of the macro you want to play.
3. Or select the macro you want and click on the run button

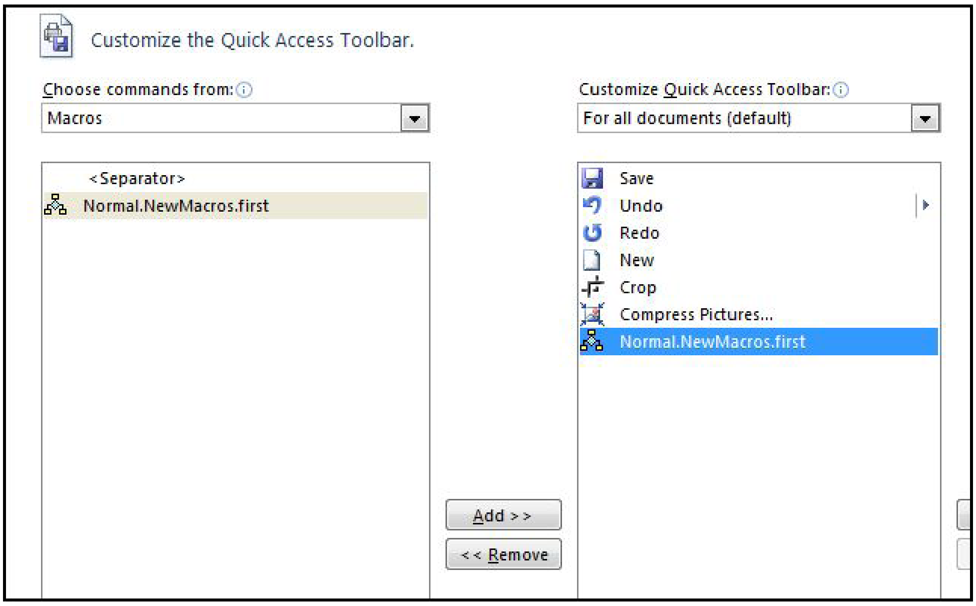
Assigning A Macro To Toolbar, Ribbon Or Key

Just as you can click buttons and press shortcut key combinations to run Word's standard commands, you can set up your macros to run from buttons and keystrokes.

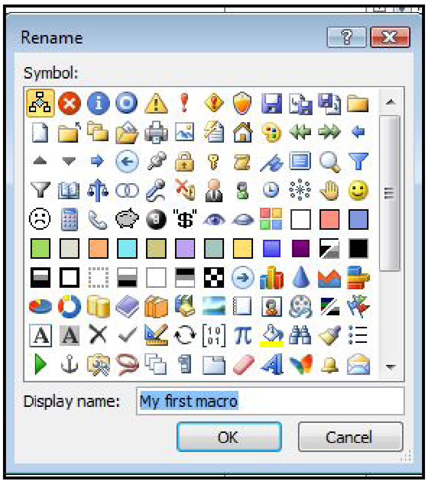
To assign a macro to a Quick access toolbar button:

Mouse

1. Move your mouse over the **QUICK TOOLBAR** and click on the drop down arrow to the right of it
2. Select **MORE COMMANDS** a dialog will open



3. Click the **CHOOSE COMMANDS FROM** drop down arrow and from the menu select **MACROS**
4. In the pane beneath all macro's created will appear.

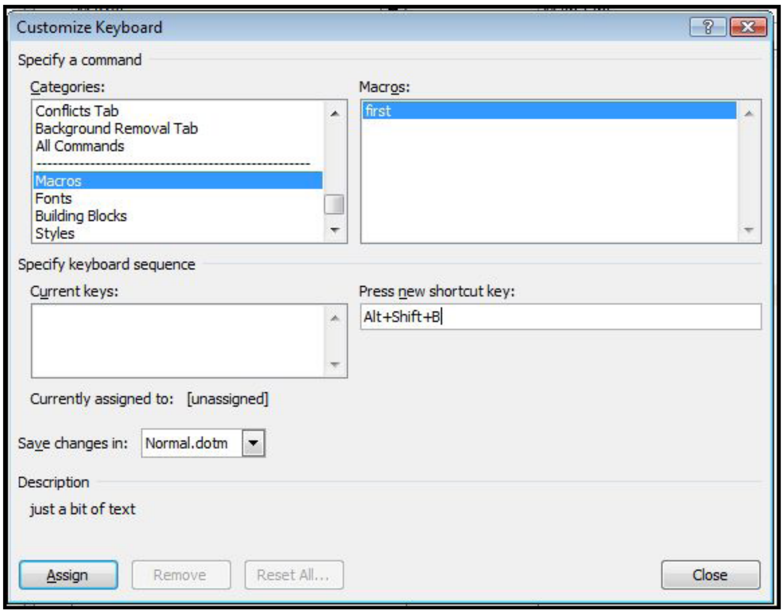


5. Select the macro and click on the **ADD** button in the centre of the dialog to add it to the **QUICK MENU** on the right.
6. The button will appear in the right hand pane with a standard macro symbol and the name of the macro, preceded by the Template name that the macro belongs to (Normal for global macros).
7. To assign a different name And an image to the button, Select the macro on the right and click on the **MODIFY** button below the pane a dialog will appear click in the **DISPLAY NAME** text box and delete the current name, replacing it with the text to appear on the button face (e.g. Insert Custom Table).select an image from the icons in the box above the text box and click on **OK**
8. Click the **CLOSE** button to close the Customise dialog box.

To add macro to a shortcut key

Mouse

1. Move your mouse over the **QUICK TOOLBAR** and click on the drop down arrow to the right of it

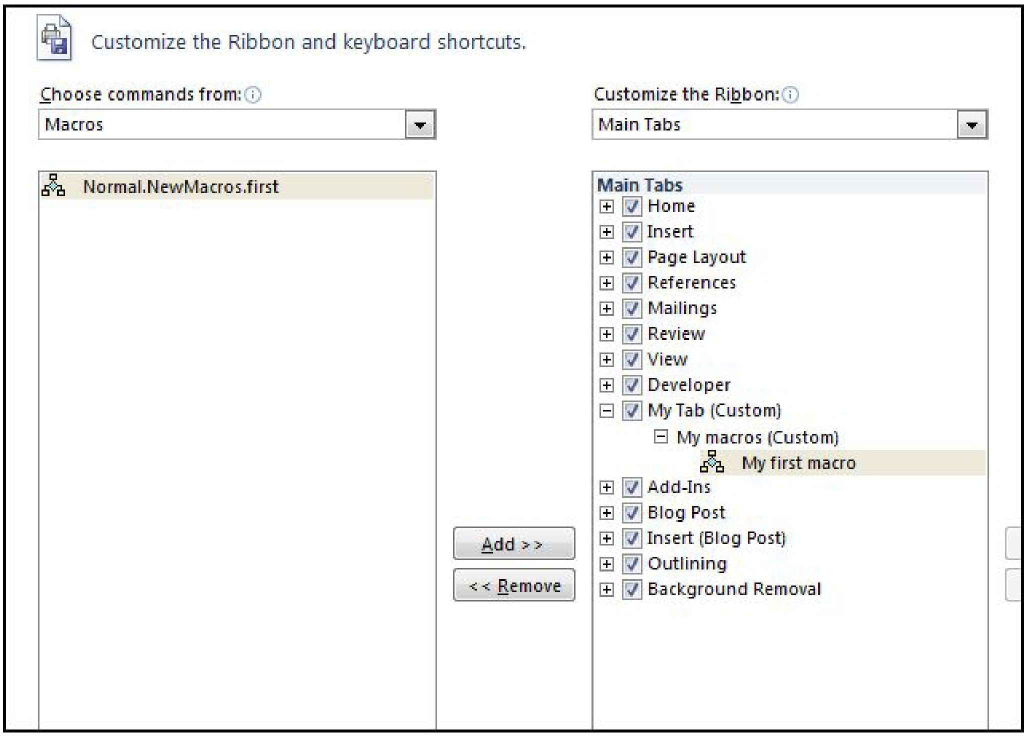


2. Select **MORE COMMANDS** a dialog will open
3. Click on the **CUSTOMISE** button below the left hand pane for **KEYBOARD SHORTCUTS** a dialog will open.
4. In the **CATEGORIES** section scroll down and locate macros.
5. When it is selected a list of macro's will appear in the right hand pane.
6. Selct the macro you wish to assign a shortcut for and enter shortcut cut key strokes into the **PRESS NEW SHORTCUT KEY** text box.
7. If it is shown as unassigned then click on the **ASSIGN** button in the bottom left corner to assign those key strokes to that macro
8. Use combination keys such as **CTRL** or **ALT** and another character to avoid accidental running of the macro
9. Repeat previous steps for all macro's you wish shortcut keys for.
10. Click on **CLOSE**.

‣ To add macro to a ribbon

Mouse

1. Go to **FILE** and **OPTIONS**
2. Go to **CUSTOMISE THE RIBBON**
3. You will see the view below



4. Create a new tab as discussed before rename it **"MY TAB"**
5. Rename the group "**MY MACROS**".
6. In the **CHOOSE COMMANDS FROM** box select **MACROS**
7. Drag your macros to the **"MY MACROS"** group on the ribbon you created.
8. Make sure the tab you created is ticked
9. Click on **OK**
10. Your macro should now appear on a new tab in its own group.

Prepared by Stephen Moffat on 17 January 2010